

Client Questionnaire for 2017 Tax Year Information

Please check all that apply. Your signature below verifies the information to be complete and accurate.

Household and Dependent Information

In 2017 how many people lived with you more than 6 months? _____

How many had income in 2017? _____ Is everyone in your household a U.S. Citizen? Yes No

Someone in household may qualify to be a dependent of someone else-or Form 8332.

There are changes of status for spouse or dependent(s).

Member(s) of household are totally disabled or legally blind.

Income/Adjustments

Foreign bank accounts, foreign income, foreign assets, foreign property or online gaming

Rollovers or distributions from any retirement account

Interest, dividend or investment/stock income with 1099s OR Cryptocurrency type transactions

Unemployment income, disability or qualified HSA distributions

U.S. Savings Bonds cashed.

I have gambling or Luckytown income for 2017 and have a record of win/ losses.

Receive or pay alimony (not child support)

Bankruptcy, foreclosure, or cancellation of debt in 2017

Itemized Deductions and Miscellaneous

Mortgage(s) interest on your residence (form 1098 required!)

Real estate tax and/or personal property tax paid in 2017

Unreimbursed employee business expenses including mileage (complete page 6 part A)

Total out of pocket paid for: medical \$_____ health insurance \$_____

Long-term care (nursing home) insurance payments \$ _____

Receipt(s) from a qualified charity acknowledging your contributions - cash or goods

Teacher who has unreimbursed classroom supplies with receipts-- Total Amount = \$_____

Paid a daycare provider or use pretax dependent care benefits

Student loan interest paid for yourself or dependents

College tuition/books paid to qualifying university for you or your dependents-- 1098T required!

Has anyone in your household attending college been convicted of a felony? Yes No

Did you make any quarterly or annual estimated tax payments for individual taxes?

Contribute \$3 to the presidential election campaign fund (or to any state trust funds)

Qualified Solar energy-efficient improvements in 2017.

Business, Rental, Farm Income (if marking yes to any question in this section, complete page 6)

Start/dispose/or have income from self-employed business, farm, rental property, partnership, LLC or S corporation this year. You MUST complete page 6.

Refund and Payment Options:

I would like my 2017 tax refund(s) direct deposited into my account located in the U.S.- voided check verified/ provided.

I will pay fees for having my taxes prepared to Norma's Tax Service with cash, check or credit/debit card.

I would like the fees for having my taxes prepared (by Norma's Tax Service) taken out of my refund (I understand that by choosing this option there is an additional fee for this bank service, and I must **complete pages 7, 8, 9 &10.**)

I would like to pay my IRS balance due with my credit card or auto-withdrawal from my account.

I request to be notified of upcoming tax seminars regarding how the new tax law may impact me.

CLIENT SIGNATURE

Phone Number

Turn over for page 2>>>>>>>