

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
- 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>>>>>>>