

### Client Questionnaire for 2018 Tax Year Information

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

#### **EVERYONE COMPLETE THIS COLUMN**

##### **Household and Dependent Information**

How many people lived in your household (include self) more than 6 months? \_\_\_\_\_ How many had income? \_\_\_\_\_

Is everyone in your household a U.S. Citizen?  Yes  No

I am unmarried and have the highest household income

Work or live in KCMO.

One or more of my dependents can be claimed by someone else-or I have Form 8332.

There are changes for spouse or dependent(s)?

Someone has total disability or legally blind.

Had credit(s) disallowed (EIC, CTC, Education).

##### **Income/Adjustments/Credits**

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

Unemployment income, disability or qualified HSA distributions.

Paid a daycare provider or pretax dependent care.

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

Student loan interest paid for yourself or dependents

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

Rollovers, distributions from any retirement account OR Social Security income

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

U.S. Savings Bonds cashed.

Receive or pay alimony (not child support)

I have gambling or Luckytown income for 2018 and have a record of win/ losses.

Bankruptcy, foreclosure, or cancellation of debt.

##### **Refund and Payment Options:**

I would like my 2018 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.

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

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 5, 6, 7, 8 & 9**)

#### **ONLY Homeowners and Businesses**

##### **COMPLETE THIS COLUMN**

##### **Itemized Deductions**

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

Home Equity Loan/used to improve home.

Real estate and/or personal property tax paid in 2018

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

Long-term care insurance payments \$ \_\_\_\_\_

Receipt(s) from a qualified charity acknowledging your 2018 contributions - cash or goods

##### **Miscellaneous**

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

Qualified energy-efficient improvements in 2018.

##### **Business, Rental, Farm Income**

Did you start/dispose of/or have income from self-employed business, farm, rental property, partnership, LLC or S Corporation? If you mark yes to this box, you **MUST complete pages B1 & B2.**

\_\_\_\_\_  
**CLIENT SIGNATURE**

\_\_\_\_\_  
**PHONE NUMBER Turn over for page 2>>>>>>>>**