



9140 Ustick Road  
Boise ID, 83704  
208-377-4303

Appointment Date & Time

Your return will be prepared based on information you provide, so it is vital that this information is accurate and complete. We do our best to ask questions and get you every deduction you are entitled to. Ultimately, you are responsible for your tax return. If you are unsure about a topic or issue, please ask.

Take the time to review this questionnaire and mark the appropriate box for each question. **Bring your questions, this questionnaire and supporting documentation (anything in parentheses) to your appointment.** With teamwork, we can prepare your return correctly and efficiently. **New clients, please bring the most recent tax return you have filed.**

Call **208-377-4303** to make your appointment. See you soon!

Yes	No	Unsure	Last Year, Did You or Your Spouse
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Change your name, address, email address, phone number or marital status?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gain or lose any dependents, adopt or plan to adopt?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have any children that lived with another parent or release an exemption to a non-custodial parent? (Form 8332 signed by the custodial parent)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have a dependent who received wages or investment income?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Inform the IRS of identity theft or receive an IP PIN? (IP PIN letter from the IRS)

Yes	No	Unsure	Healthcare - Last Year, Did You or Your Spouse
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have health insurance coverage for all 12 months of 2016 for all members of your household? (1095-A, 1095-B or 1095-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Purchase health insurance through YourHealthIdaho.org or other healthcare exchange? (1095-A)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive an exemption from YourHealthIdaho.org or other healthcare exchange website? (Exemption Letter)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Make withdrawals from or contribution to a Health Savings Account - <i>HSA</i> , Medical Savings Account - <i>MSA</i> , or Idaho Medical Savings Account? (1099-SA, 5498-SA or deposit record)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pay health insurance premiums or long-term care insurance premiums, including COBRA, Tricare or Medicare? Bring summary totals.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pay significant medical expenses, enough to itemize, or will you file for the Circuit Breaker? If so, bring a summary of expenses. Include health insurance premiums, hospital bills, prescription drugs, copays, lab fees, eye glasses, hearing aids, dental, lodging, mileage, etc. Do not include expenses paid or reimbursed by insurance or from a Health Savings Account, Flex 125 Plan or other pretax funds.

Yes	No	Unsure	Income - Last Year, Did You or Your Spouse Receive
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Salary, Wages, Tips, Bonuses, Commissions? (Form W-2)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disability income from insurance or worker's compensation? (Form 1099-R, W-2)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interest or dividends from checking or savings accounts, CDs, bonds, stocks, brokerage accounts? (Form 1099-INT, 1099-DIV, 1099-OID)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Refund of state income taxes? (Form 1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alimony income or separate maintenance payments? Do not include child support.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Self-employment income? (Form 1099-MISC, 1099-K and Income & Expense Summary*)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payments for work performed that was not reported on Forms W-2 or 1099-MISC?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Income or loss from the sale of stocks, bonds, real estate, or an interest in a Partnership or S Corp? (Form 1099-S, 1099-B, Closing Statement)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Income or loss from the sale of items or equipment used in a trade or business?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock options or grants from an employer? Did you exercise options or grants or let them expire?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Proceeds from investments, securities, calls, puts, or short sales not reported on 1099-B?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payments from IRAs, Pensions, Annuities? (Form 1099-R)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Income or loss from renting real estate or personal property? (Form 1099-MISC and Income & Expense Summary*)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Income or loss from Partnerships, Royalties, S Corporations, Trusts, Estates? (Schedule K-1) You do not need the K-1s to make your appointment, you can provide them later.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Income or loss from Farming? (1099-MISC and Income & Expense Summary*)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Unemployment compensation? (Form 1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Security or Railroad Retirement Benefits? (Form SSA-1099, RRB-1099)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foreign income or income from any source outside the US?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gambling or lottery income? (Form W-2G) You can deduct losses up to total winnings.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other income from prizes, awards, jury duty, hobbies, online sales, bartering, inheritance, Alaska Permanent Fund Dividends, taxable scholarships, etc.?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cancellation/forgiveness of debt or declare bankruptcy? (Form 1099-C, 1099-A)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reimbursement for previous or currently deductible expenses, for example, moving, job, medical, etc.?

\*See our website, [www.Adataxpros.com](http://www.Adataxpros.com), for Income & Expense Summary.

Yes	No	Unsure	<b>Expenses - Last Year, Did You or Your Spouse Pay</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Moving expenses to relocate for work, for example mileage, storage fees, lodging?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alimony or separate maintenance payments? Do not include child support. (Recipient's name & Social Security number)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contributions to or convert/rollover a retirement account, including IRA, 401K, Roth IRA, SEP, SIMPLE or other?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	State income tax including prior years?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Real estate tax including primary home, vacation home and investment property?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Personal property tax including RV sticker fee, boat or irrigation tax?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sales tax from a large purchase, for example, vehicles, boats and airplanes?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Buy or refinance your home, vacation home or investment property? (Closing statement)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Home mortgage interest, points, home equity loan interest, mortgage insurance premiums? (Form 1098)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment expenses, portfolio management fees, investment or margin interest?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cash charitable donations or charitable travel? (Receipts, mileage log)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Noncash charitable donations? (Receipts with date, description and fair market values)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Job-related expenses not paid or reimbursed by your employer, for example, tools, union dues, travel, professional dues, home office, vehicle expenses other than to and from work? (Expense summary*)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child or dependent care expenses, e.g., daycare? (Statement from provider with EIN)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Anyone to work in your home on a regular basis? For example, if you paid a maid, housekeeper, nanny, babysitter, healthcare provider, or gardener, more than \$1,900 for the year, or \$1,000 in any quarter, you may have a household employee.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expenses related to self-employment income or any other income received? (Expense Summary*)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Incur casualty or theft losses, for example, fire, flood, damaged or stolen property?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other deductible expenses, e.g., tax prep fee, safe deposit box rental, gambling losses?

Yes	No	Unsure	<b>Education - Last Year, Did You or Your Spouse</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Withdraw funds from a 529 College Savings Plan or Coverdell Savings Plan? (1099-Q)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contribute to a 529 College Savings Plan or Coverdell Savings Plan?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pay college or educational expenses for you or your dependents? (Form 1098-T, <b>AND</b> Account Statement from the school with detailed summary of payments, scholarships and charges, <b>AND</b> receipts for books and other required course materials)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pay student loan interest? (Form 1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Purchase classroom supplies or equipment or pay for professional development as a teacher, teacher's aide, or eligible educator?

Yes	No	Unsure	<b>Idaho Specific - Last Year, Did You or Your Spouse</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Live and work in Idaho all of 2016?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintain a home for an elderly or disabled family member?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive food stamps, reside in the US illegally, or were you incarcerated? This affects your grocery credit eligibility and we will need to know how many months.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Make out-of-state purchases including internet or mail order, where sales tax was not collected?

Yes	No	Unsure	<b>Misc - Last Year, Did You or Your Spouse</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rent out a room in your home or host a foreign exchange student?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Purchase a new plug-in electric or qualified fuel cell motor vehicle?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Purchase fuel for non-highway vehicles used in farming or business?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Were you blind, disabled, or turn 65 or 70 1/2?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	File a federal return last year with a loss carryover or net operating loss?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive a letter from the IRS or State Tax Commission? (Bring letters)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Make estimated Federal and/or State tax payments? (Amounts and dates)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Make energy-efficient improvements to your home, e.g., windows, insulation, etc.?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Give gifts to anyone with an accumulated value of more than \$14,000 per recipient?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive the First-time Homebuyer Credit in 2008?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Experience foreclosure or repossession of your home or other property? (1099-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have a financial interest in or signature authority over a financial account located in a foreign country? Financial accounts include bank account, securities account, brokerage account, investment account and other financial assets.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive a distribution from or were the grantor of, or transferor to, a foreign trust?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Own foreign financial assets including property?

Yes	No	Unsure	<b>This Year, Do You or Your Spouse</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Want your refund to be direct deposited? (Routing & account number)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Would you like to have your refund applied to next year's taxes?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expect significant changes in income or expenses in the next year?

Best phone number \_\_\_\_\_ Email \_\_\_\_\_

Use our new Portal (SecureFilePro) to send and receive documents. The login link is on our website. You can get started as a guest login, or we can send you a link to your new account. All you need to do is create a password. Once you are logged in, you can send and receive documents securely. **Please do not email sensitive information.**