ADATAX PROFESSIONALS

9140 W Ustick Road
Boise ID 83704

Please take time to review our questionnaire for **2018**. There are many new tax laws taking effect. Your return will be prepared based on information you provide, so it is vital that this information is accurate and complete.

Bring your Tax Documents, Supporting Documentation and this Questionnaire to your appointment. Working as a team, we can prepare your return correctly and efficiently. If you are self-employed or have rentals, please use the worksheets found at adataxpros.com/resources.

New clients: Please bring your most recent tax return.

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

Contact Information

Appointment Date & Time

Best phone number: ______________________________________

Best email: ____

Would you like this questionnaire emailed to you next year? Y / N

Please **DO NOT EMAIL** sensitive information. Use our document portal (secureFilePro) to send and receive documents. The link is on our website: adataxpros.com You may also fax to 208-377-2944.

Personal and Household Information (circle items that have changed)

Name	Household Members	Identity Theft IP PIN
Address	Supporting Others	Blind
Marital Status	Child living with another parent	Disabled
Dependents	Released exemption for child	Turn 65 or 70 1/2
Citizenship	Child with income	No changes for 2018

Income Sources (circle all that apply)

Employer	Self-employment Income / Business
Tips not reported on W-2	Short-term rental (Airbnb or similar)
Disability	Rent out a room in your home
Unemployment	Uber, Lyft or other car sharing income
Social Security	Upwork, TaskRabbit or other freelancing income
Railroad Retirement	Poshmark, thredUPor other fashion sharing income
IRA distributions	Sale of business or former business property
Pension & Annuity	Sale of Stocks, Bonds or Real Estate
Other retirement	Stock options or grants from employer
Refund of state income tax	Farming
Long Term Care Benefits	Foreign income
Hobby Income	Nontaxable income, VA benefits, or SSI
Interest	Alimony income
Dividends	Cancellation or forgiveness of any debts
Rental of Real Estate	Gambling or Lottery winnings
Rental of personal property	Prizes, awards, fantasy football, etc.
Partnership (K-1)	Jury duty
S Corp (K-1)	Alaska Permanent Fund Dividend
Trusts or Estates (K-1)	Spiff payments
Sale of personal property	Barter
Other Investments	Other Income

Education (circle all that apply) *bring 1098-T and student account statements

Tuition & educational expenses*	529 College savings contributions or withdrawals
Paid student loan interest	530 Coverdell savings contributions or withdrawals

Health Insurance and Medical Accounts (circle all that apply)

Paid thru payroll	Medicare	Contribute to an HSA or MSA
Paid by former employer	Supplemental Medicare	Withdrawals from HSA or MSA
Health Care Exchange	Dental	Everyone insured
Premium subsidy received	Vision	Some insured
Medicaid	Long Term Care	Not insured

Medical Expenses not paid by insurance or HSA or MSA accounts (circle all that apply)

Medical expenses are needed if you qualify for Property Tax Reduction (Circuit Breaker) or if your total medical is more than 7.5% of your AGI.

Hospital	Prescription Drugs	Dental	Other
Doctors	Eye glasses	Mileage	
Lab Fees	Hearing aids	Out of town lodging	

Schedule A Itemized Deductions (bring supporting documents if you might be itemizing)

Medical (see above)	Mortage interest paid	New 2018 Standard Deduction
Property Taxes †	Cash Charitable Donations	Married = 24,000 plus 1,300 if ≥ 65
State Income Tax †	Noncash Charitable Donations	Single = 12,000 plus 1,600 if ≥ 65
Sales tax on large purchases †	Charitable Miles	If the total of these items are less
Irrigation Tax †	Gambling Losses	than the standard deduction,
RV Registration fee †	Losses in declared Disaster Area	you will not be itemizing.
		† Total taxes limited to 10,000

Miscellaneous Expenses (circle all that apply) *bring worksheets and supporting documents

Business Expenses*	Plug in electric vehicle	Other retirement accounts
Rental Expenses*	Alternative energy equipment	Adoption
Child/Dependent care	Energy Efficient Improvements	Educator / Classroom Supplies
Alimony	Traditional IRA contributions	Other
Household Employee	Roth IRA contributions	

Foreign Holdings and Transactions (circle yes or no)

Yes / No Receive a distribution from or were the grantor of, or transferor to, a foreign trust?

Yes / No Own foreign financial assets including property?

Yes / No Have a financial interest in or signature authority over a financial account in a foreign country?

Financial accounts include bank account, securities account, brokerage account, investment accout and other financial assets.

Idaho Specific (circle yes or no)

Yes / No Lived outside Idaho

Yes / No Income from another state

Yes / No Received food stamps, residing in US illegally or incarcerated during the year

Yes / No Made purchases where sales tax was not collected

Yes / No Cash donation to qualifying Educational Organization (bring receipts)

Yes / No Cash or goods donated to qualifying Youth or Rehab Organization (bring receipts)

Miscellaneous (circle yes or no and bring documents if yes)

Yes / No Received letter from the IRS or State Tax Commission

Yes / No Made estimated federal or state tax payments

Yes / No Gave gifts with an accumulated value of over $15,000 per receipient

Yes / No Paid First-time Homebuyer Credit from 2008

Yes / No Declared bankruptcy, experienced forclosure or repossession of your home or property

Yes / No Bought, sold or refinanced your home, vaction home or investment property

Yes / No Received letter from DOD regarding lump sum Veteran disability payments

How would you like to receive your refund? (please circle)

Mailed to my current address	Direct Deposit to
Applied to 2019 taxes	New Account Number ________________________
Direct Deposit to same account as last year	New Routing Number _________________________

Tax Planning for 2019 and beyond (please circle all that might apply)

Significant change in income	Retirement	Inheritance
Significant change in expenses	Age 70 1/2	Business Venture
Marital Status	Medical expenses	Business Disposition
Children	Sale of Home	Other

Notes:

Questions? Please call us at 208-377-4303 if you have questions regarding documents to bring or an interpretation of anything on this questionnaire.