



9140 W Ustick Road

Boise ID 83704

RETURN SERVICE REQUESTED

***** **Very Important News Included. Please Read the Newsletter!** *****

Please take time to review our questionnaire for **2019**. 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 adatatxpros.com/resources.

New Clients: Please bring your most recent tax return.

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

Contact Information

Best phone number: _____

Best email: _____

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

Appointment Date & Time

Please **DO NOT EMAIL** sensitive information. Use our document portal (secureFilePro) to send and receive documents. The link is on our website: adatatxpros.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
Renewed Driver's License or State Identification		

Income Sources (circle all that apply)

Employer (W-2)	Self-employment Income / Business (1099-Misc)
Tips not reported on W-2	Short-term rental (Airbnb or similar)
Disability	Rent out a room in your home
Unemployment (1099-G)	Uber, Lyft or other car sharing income
Social Security (1099-SA)	Upwork, TaskRabbit or other freelancing income
Railroad Retirement	Poshmark, thredUP or other fashion sharing income
IRA distributions (1099-R)	Sale of business or former business property
Pension & Annuity (1099-R)	Sale of Stocks, Bonds or Real Estate (1099-B or 1099-S)
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 (1099-Int)	Alimony income
Dividends (1099-Div)	Cancellation or forgiveness of any debts (1099-C)
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 (1099-Q)
Paid student loan interest (1098-E)	530 Coverdell savings contributions or withdrawals (1099-Q)

Health Insurance and Medical Accounts (circle all that apply)

Health Care Exchange (1095-A)	Contribute to an HSA or MSA (5498-SA)	Dental
Premium subsidy received	Withdrawals from HSA or MSA (1099-SA)	Vision
Medicare Premiums	Were all HSA/MSA withdrawals used for	Long Term Care
Supplemental Medicare	qualified medical expenses?	

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)	Mortgage Interest Paid	2019 Standard Deduction Married = 24,400 plus 1,300 if ≥ 65 Single = 12,200 plus 1,650 if ≥ 65 If the total of these items are less than the standard deduction, you will not be itemizing. [†] Total taxes limited to 10,000
Property Taxes [†]	Mortgage Insurance Premiums	
State Income Tax [†]	Cash Charitable Donations	
Sales Tax on Large Purchases [†]	Noncash Charitable Donations	
Irrigation Tax [†]	Charitable Miles	
RV Registration Fee [†]	Gambling Losses	
Losses in Declared Disaster Area		

Miscellaneous (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	Household Employee	Other

Qualified Charitable Distributions (made directly to charities from retirement accounts)

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 account and other financial assets.

Idaho Specific (circle yes or no)

Yes / No Lived outside Idaho

Yes / No Received 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)

Idaho School, Library, Museum, Historical Society, Public TV, Public Radio, etc

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

Idaho Youth Ranch, Arc, Gem Services, Women's and Children's Alliance, Hope House, etc

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 recipient

Yes / No Paid First-time Homebuyer Credit from 2008

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

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

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

Yes / No Have you contributed to a ROTH/Traditional IRA this year

Yes / No Are you interested in making an IRA contribution before April 15th

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

Mailed to my current address

Direct Deposit to

Applied to 2019 taxes

New Routing Number _____

Direct Deposit to same account as last year

New Account 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

Questions? Please call us at 208-377-4303 if you have questions or need a further explanation of anything on this questionnaire.