



2018 Tax Questionnaire

As with all our forms, you may submit this information electronically using our secure online submit forms. Using this PDF as a work paper and submitting the information electronically is a convenient way of sending your information. Our PDFs are not fillable.

And all online submit forms are converted to a text file and saved in your client portal for historical purposes. You can access our online submit forms here:

www.blueskiestaxservice.com/taxes

Please review the following questions. Circle "Y" for those that pertain to you. All questions refer to the 2018 tax year. Good luck!

Name _____

Personal Information

- | | |
|--|---|
| Did your address change? | Y |
| Did your marital status change? | Y |
| Can you be claimed as a dependent by another taxpayer? | Y |
| Did you change any bank accounts for direct deposits? (returning clients only) | Y |
| Did you pay or receive alimony or spousal maintenance? | Y |

Dependent Information

- | | |
|---|---|
| Were there any changes in dependents from the prior year? | Y |
| Are you divorced with shared custody | Y |
| Do you alternate dependents with an ex-spouse for tax purposes? | Y |
| Did any of your children have investment income? | Y |
| Do you have dependents who have or will file a tax return? | Y |
| Did you provide support for any dependents besides your children? | Y |

Did you pay for child care while you worked or looked for work? Y

Retirement, Estate Planning, Inheritance

Did you make any IRA or Roth IRA contributions? Y

Did you make any Keogh, SIMPLE, SEP or i401k contributions? Y

Have you recently received or will you receive an inheritance? Y

Itemized Deduction Information

Do you have evidence to prove your charitable contributions? Y

Did you make any major purchases during the year (cars, boats, etc.)? Y

Did you make any out of state purchases and not pay sales tax? Y

Did you pay additional state income taxes last year? Y

Are you a renter (potential state renters' credits)? Y

Medical

Did you have any withdrawals from an HSA or flex-spending plan? Y

Did you use HSA or flex-spending funds to pay for medical expenses? Y

Did you pay long-term health care premiums for yourself or your family? Y

Did you pay any COBRA health care coverage continuation premiums? Y

Did you pay for the care of someone else (for example, parents)? Y

Education

Did you pay any student loan interest? Y

Did you or a dependent have any tuition or school-related expenses? Y

Did you make any contributions to an education savings or 529 plan account? Y

Purchases, Sales and Debt Information

Did you sell, exchange, or purchase any real estate? Y

Did you foreclose or abandon any real estate? Y

Did you refinance a principal residence or second home? Y

Did you make any improvements in any property? Y

Are you required to pay back the First Time Home Buyer Credit?	Y
Do you own a motor home, trailer or boat?	Y
Did you buy or sell of any stock besides retirement accounts?	Y
Do you have a self-directed IRA?	Y
Did you incur any non-business bad debts?	Y
Did you have any debts canceled or forgiven?	Y

Income Information

Did you earn any income such as tips that is not reported on a tax form?	Y
Did you have any gambling winnings?	Y
Did you receive any payments from a pension, IRA or 401(k) plan?	Y
Did you make any early distributions from a retirement account?	Y
Did you make any withdrawals from an education or 529 plan account?	Y
Did you receive any Social Security benefits?	Y
Did you receive any unemployment benefits?	Y
Did you receive any disability income?	Y
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	Y

Business Owners

- | | |
|--|---|
| Did you purchase or sell any business assets? | Y |
| Did you pay health insurance premiums for you or your employees? | Y |
| Are you a partner in an LLC or S-Corp? | Y |
| Did you utilize an area of your home for business purposes? | Y |
| Did you use your car for your job other than commuting? | Y |
| Did you use your cell phone or internet for your job? | Y |
| Did you engage in any bartering transactions? | Y |
| Did you have any expenses related to seeking a new job? | Y |

Miscellaneous Information

- | | |
|---|---|
| Did you make any estimated tax payments? | Y |
| Did you make gifts of more than \$14,000 to any individual? | Y |
| Did you pay any individual as a household employee or nanny? | Y |
| Did you make energy efficient improvements to your main home? | Y |
| Did you purchase an alternative fuel vehicle? | Y |
| Did you travel more than 100 miles for a military reserve post? | Y |
| Do you have signature authority of a foreign bank account? | Y |

Is there anything else that might affect your taxes for 2018?

Please call or email us anytime with your questions and concerns. Thank you in advance, and we look forward to working with you!

Blue Skies Tax Service