

Individual Tax Client Intro Questions

- Yes No 1. Are you Self-Employed or do you receive hobby income?
 Yes No If you are Self-Employed, do you have written records of all income and expense?
 Yes No If yes, did you make estimated tax payments?
- Yes No 2. Do you have a foreign bank account, trust, or business?
 Yes No If yes, was the value greater than \$50,000?
- Yes No 3. Did you receive any correspondence from the IRS or State Department of Taxation in the last 2 years?
- Yes No 4. Were there any births, deaths, marriages, divorces or adoptions during the tax year to be filed?
- Yes No 5. Did you give a gift of more than \$15,000 to one or more people during the tax year to be filed?
- Yes No 6. Did you have any debts cancelled, forgiven, or refinanced during the tax year to be filed?
- Yes No 7. Did you go through bankruptcy proceedings in the past 2 years?
- Yes No 8. Do you have any dependent children with unearned income of more than \$1,050?
- Yes No 9. Did you sell a personal residence?
- Yes No 10. Do you have a rental property?
 Yes No If yes, do you have a detailed list of income and expenses for each property?
- Yes No 11. Are there any significant changes between last tax year and this tax year?
If yes, please provide a brief list below: