Questions

Please check the appropriate box and include all necessary details and documentation.

If yes, explain: Did you raddress change from last year? If yes, explain: Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account numbers change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter. Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter. Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires. Dependent Information Were there any changes in dependents from the prior year? If yes, explain: Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,100? Do you have dependents who must file a tax return? Did you provide over half the support for any other person(s) other than your dependent children during the year? Did you pay any expenses related to the adoption of a child during the year? Did you pay any expenses related to the adoption of a child during the year? Did you yay any expenses related to the adoption of a child during the year? Did you yay expenses related to the adoption of a child during the year? Did you sell, exchange, or purchase rental property during the year? Did you sell, exchange, or purchase any assets used in your trade or business? Did you sell, exchange, or purchase any real estate during the year? Did you sell, exchange, or purchase any real estate during the year? Did you usell, exchange, or purchase any real estate during the year? Did you usell an existing business, rental, or other property this year? Did you usell an existing business, rental, or other property bits year? Did you usell an existing b	Personal Information	√ if applicable
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Did ayor your life insurance policies mature, or did you surrender any policies? Did you receive any awards, prizes, hobby income, gambling or lottery winnings? Do you expect a large fluctuation in income, deductions, or withholding next year? Did you have any sales or other exchanges of virtual currencies, or used virtual currencies to pay for goods or services, or you are holding virtual currencies as an investment? Retirement Information Are you an active participant in a pension or retirement plan? Did you receive any Social Security benefits during the year? Did you receive any social Security benefits during the year? Did you make any withdrawals form an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, were any withdrawals due to a Federally declared disaster? Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? Education Information If you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses Did anyone in your family receive a scholarship of any kind during the year? If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board? Did you make any withdrawals from an education savings or 329 Plan account? If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account? Did you make any contributions to an education savings or 329 Plan account? If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account? Did you make any contributions to an education savings or 329 Plan account? If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account? Did you pra		
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If you are a business owner, did you pay health insurance premiums for your employees this year?	
Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, attach any Form(s)	
1099-H you received.	
<u>Itemized Deduction Information</u>	V if applicable
Did you incur a casualty or theft loss or any condemnation awards during the year? If yes, did the loss	
occur in a Federally declared disaster area?	
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? Did you make any	
cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide evidence	
such as a receipt from the donee organization, a canceled check, or record of payment, to	
substantiate all contributions made.	
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written	
acknowledgment from the donee organization.	
Did you pay real estate taxes for your primary home and/or second home?	
Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098 you	
received.	
Did you incur interest expenses associated with any investment accounts you held? Did you make any	
major purchases during the year (cars, boats, etc.)?	
Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the	
seller did not collect state sales or use tax?	
<u>Miscellaneous Information</u>	√ if applicable
Did you make gifts of more than \$15,000 to any individual? Did you utilize an area of your home for	V if applicable
Did you make gifts of more than \$15,000 to any individual? Did you utilize an area of your home for business purposes? Did you engage in any bartering transactions?	√ if applicable
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Please complete the following information:	
Name:	-
Address:	
Phone Number:	
Email:	
Bank Routing Number:	-
Bank Account Number:	_