

2018 TAX CHECKLIST & QUESTIONNAIRE

2018 Filing Status? Single Married Filing Jointly Married Filing Separately Head of Household Qualifying Widower

| | | | |
|--|-----------------|-------------|------------------|
| Your Name (First Mid. Int. Last): | SSN: | DOB: | Occupation: |
| Driver's License No. or Other ID: | Issuing Agency: | Issue Date: | Expiration Date: |
| Spouse's Name (First Mid. Int. Last): | SSN: | DOB: | Occupation: |
| Spouse's Driver's License No. or Other ID: | Issuing Agency: | Issue Date: | Expiration Date: |
| Mailing Address: | Cell Phone: | Work Phone: | Other: |
| | E-mail Address: | | |

Did your marital status change due to divorce, separation, death of a spouse, etc. in 2018? Yes No
 Can you be claimed as a dependent on someone else's tax return? Yes No
 Have you been claimed as a dependent on someone else's tax return? Yes No

DEPENDENT / QUALIFIED CHILDREN:

| Name: | SSN: | Birthdate: | Age: | Relationship: | Mos. Lived w/ You: | College Student: | Gross Income: |
|-------|------|------------|------|---------------|--------------------|------------------|---------------|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Did you provide over half the support for any other person during 2018? Yes No
 Do you have any dependent children who must file a 2018 Federal or State tax return? Yes No

As a courtesy, dependent children's tax returns are prepared free of charge.

INCOME: (Please check "✓" all that apply)

Postcard Income:

- Wages, salary, tips, etc. **(W-2s)**
- Tips not reported on W-2s
- Tax-exempt Interest **(1099-INT)**
- Taxable Interest **(1099-INT, Bank Statements)**
- Stock or mutual fund dividends **(1099-DIV)**
- IRA withdrawals, rollover or transfer **(1099-R)**
- Pension income **(1099-R)**
- Annuity income, payments or transfer **(1099-R)**
- Social Security Benefits **(SSA-1099)**

SCHEDULE 1 – Additional Income:

- Previous year's state tax refund
- Alimony received
- Business or hobby income / loss **(Schedule C)**
- Capital gains of investments **(1099-COMP)**
- Rental property income
- Partnership income **(K-1)**
- Estate income **(K-1)**
- Unemployment or Disability income **(1099-G)**
- Gambling / lottery winnings **(W-2G)**
- Foreign income
- Payments from education accounts **(1099-Q)**
- Other: _____

SCHEDULE 1 – ADJUSTMENTS TO INCOME: (Please check "✓" yes or no to each question)

Did you incur any expense as a direct result of teaching **(Educator Expense Deduction)**? Yes No
 Did you contribute to a Health Savings Account **(HSA)** individually or through work? Yes No
 Did you move as a member of the Armed Forces in 2018 **(Moving Expense Deduction)**? Yes No
 Did you contribute to a SEP, SIMPLE or other self-employed qualified plan in 2018? Yes No
 Did you withdrawal funds from an IRA, 401(k), etc. prior to 59½ **(Early Withdrawal Penalty)**? Yes No
 Did you pay alimony **(Alimony Adjustment)**? Yes No
 Did you contribute to an Individual Retirement Account (IRA) or Roth IRA in 2018? Yes No
 Did you pay interest on a student loan **(Student Loan Interest Deduction)**? Yes No
 Was everyone within your household covered by health insurance the entire year? Yes No
 Did you receive a Health Insurance Marketplace Statement **(1095-A, B or C)** in 2018? Yes No
 Did you pay quarterly estimated taxes last year? Yes No

If yes, amount paid: 1st Quarter: Fed: _____ St: _____ 2nd Quarter: Fed: _____ St: _____
 3rd Quarter: Fed: _____ St: _____ 4th Quarter: Fed: _____ St: _____

ITEMIZED TAX DEDUCTIONS: (Please check "✓" all that apply)

Please note that the standard deduction for 2018 is \$12,000 for single filers and \$24,000 for joint filers. Your itemized deductions should exceed these amounts to complete this section.

- Medical and Dental Expenses (7.5%)
Health Insurance / Medicare Part B
State and Local Taxes
New Motor Vehicle or Boat sales tax
Real Estate Property Taxes
Home Mortgage Interest / Points Paid
Mortgage Insurance
Gifts to Charity (Documented)
Casualty or Theft Losses
Other:

Did you itemize your tax deductions last year? Yes No

TAX CREDITS & MISC.: (Please check "✓" yes or no to each question)

- Did you sell, purchase or refinance your primary residence in 2018 (1099-S)?
Did you install a geothermal, solar, or wind energy system to your primary residence in 2018?
Did you make any payments to a licensed dependent daycare provider in 2018?
Did you adopt a child in 2018 or have adoption credit carried over to 2018?
Did you pay education tuition and fees for you, your spouse or dependent child in 2018?
Did you pay foreign income or investment tax?
Did you contribute to a 401(k), 403(b), Simple IRA or other company retirement plan in 2018?

STATE RETURN: (Please check "✓" yes or no to each question)

- Did you purchase / renew a WI special tax-deductible license plate in 2018?
Did you purchase (through internet, etc.) items where WI sales tax is due but not paid?
Did you work in or receive income from a state other than WI?
Did you pay rent in 2018? (Heat included / Heat not included) \$ / mo. x
Did you contribute to WI's 529 college savings program (Tomorrow's Scholar or EdVest)?

OTHER: (Please check "✓" yes or no to each question)

- Were you ever audited or received correspondence by the IRS?
Were you ever delinquent in paying your taxes or ever modified your tax return after it was filed?
Do you have children with investment income greater than \$2,100 (Kiddie Tax)?
Did you or your spouse make or receive gifts of over \$15,000 in 2018?
Did you file bankruptcy, foreclose or have any debt forgiven or cancelled in 2018?
Did you turn 70 1/2 prior to December 31st of 2018 (RMD)?
Do you want direct deposit of your refund? (If so please supply voided check or deposit slip)?
Did your direct deposit account change from what is on file from last year? (Circle One) Same Changed

2019 TAX PLANNING: (Please check "✓" yes or no to each question)

- Do you plan to enroll in the Affordable Care Act health exchanges 2018?
Will you file bankruptcy, have any lender forgive / cancel debts (credit cards, etc.) in 2019?
Do you and / or your spouse plan to retire or have significant life / income changes in 2019?
Do you expect to undergo any major-medical expenses in 2019?
Will any dependent children turn 17 or be entering college or vocational school in 2019?
Will you turn 70 1/2 prior to December 31st of 2019? (RMD)

Notes:

REQUIRED DOCUMENTATION NEEDED TO COMPLETE TAX RETURNS:

- Red lines for required documentation.