If any of the following items, on any of the **FOUR** pages pertain to you or your spouse for 2018, please check the appropriate box and provide additional information if necessary

**PERSONAL INFORMATION**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Did your marital status change during the year? |
|  |  | Did your address change during the year? |
|  |  | Could you be claimed as a dependent on another person's tax return for 2018? |

**DEPENDENTS**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Were there any changes in dependents? |
|  |  | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2018? |
|  |  | Did you have any children under age 19 or full-time students under age 24 at the end of 2018, with interest and dividend income in excess of $1,050, or total investment income in excess of $2,100? |

**EDUCATION**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? |
|  |  | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, how many years have you been attending college? |

**HEALTH CARE COVERAGE**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Did you and your dependents have healthcare coverage for the full-year? |
|  |  | Did you receive any of the following IRS Documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) If so, please upload to share drive. |
|  |  | If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship? If you received an exemption certificate, please upload to share drive. |

**INCOME**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Have you received statements from all income you earned this year, including, 1099-MISC for subcontracted work, 1099-INT from online savings or 1099-DIV & 1099-B from investment accounts? |
|  |  | Did you receive any unemployment or disability income? If so, have you downloaded your statement from the state website? |

**ESTIMATED TAXES**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Did you apply an overpayment of 2017 taxes to your 2018 estimated tax (instead of being refunded)? |
|  |  | If you have an overpayment of 2018 taxes, do you want the excess applied to your 2019 estimated tax (instead of being refunded)? |
|  |  | Do you expect your 2019 taxable income and withholdings to be different from 2018? |

**PURCHASES, SALES AND DEBT**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, or trust? |
|  |  | Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? |
|  |  | Did you buy or sell any stocks, bonds or other investment property in 2018? |
|  |  | Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2019? |
|  |  | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? |
|  |  | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If so, have you claimed this credit in prior years? |
|  |  | Did you have any debts cancelled or forgiven? If so, did you receive a 1099-C? |
|  |  | Does anyone owe you money which has become uncollectible? |

**RETIREMENT PLANS**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
|  |  | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
|  |  | Did you transfer or rollover any amount from one retirement plan to another retirement plan? |
|  |  | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2018? |

**ITEMIZED DEDUCTIONS**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Did you incur a loss because of damaged or stolen property? |
|  |  | Did you work out of town for part of the year? |
|  |  | Did you use your car on the job (other than commuting to and from work)? |

**MISCELLANEOUS**

|  |  |  |
| --- | --- | --- |
| **Yes** | **No** |  |
|  |  | Do you want to electronically file your tax return? |
|  |  | May the IRS discuss your tax return with your preparer? |
|  |  | Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? |
|  |  | Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts? |
|  |  | Was your home rented out or used for business? |
|  |  | Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station? |
|  |  | Did you or your spouse make any gifts to an individual that total more than $15,000, or any gifts to a trust? |
|  |  | Did your bank account information change within the last twelve months for your direct deposit or payment? |
|  |  | Were you notified or audited by either the Internal Revenue Service or the State taxing agency? |