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2019 Tax Questionnaire

Thank you for being a valued Lange Tax & Financial Services client. For Tax Year 2019 and on, we are simplifying things by sending just key questions we need to know to prepare and understand your tax situation as well as confirmation of your contact information and banking information (for direct deposit or electronic tax payments).

Please answer the questions by clicking the box if it is a Yes answer. Also, type in your current contact information as well as banking information if you would like direct deposit or to pay your tax due electronically. **If you would like a traditional organizer like prior years, please contact Candy at Candy@LangeTax.com and she will get a full organizer over to you.**

After completing the questionnaire, please send back via SmartVault, our secure portal, along with any source documents. A list of common source documents we will need is **below. We no longer accept documents via email due to security concerns for our clients as well as our firm.**

We need your documents either via SmartVault, mail, or drop-off to our office by March 20, 2020 to ensure we can complete your return on time. If we have not received your documents by March 20, 2020 an extension may be required.

Thank you for your cooperation as we continue to attempt to make things more mobile and secure for all of our clients.

Sincerely,

Lange Tax

Common Source Documents:

- W-2
- 1099-Misc
- 1099-Int
- 1099-Div
- 1099-B – Brokerage Statement
- Charitable Donations Statements
- 1098-Mortgage Interest Statement
- Property Tax Statement

Questions

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

Personal Information	✓ if applicable
Did your marital status change during the year? If yes, explain: _____	<input type="checkbox"/>
Did your address change from last year? If yes, explain: _____	<input type="checkbox"/>
Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number 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 to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? If yes, please provide new numbers: _____	<input type="checkbox"/>
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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
Dependent Information	
Dependent Information	✓ if applicable
Were there any changes in dependents from the prior year? If yes, explain: _____	<input type="checkbox"/>
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,100?	<input type="checkbox"/>
Do you have dependents who must file a tax return?	<input type="checkbox"/>
Did you provide over half the support for any other person(s) other than your dependent children during the year?	<input type="checkbox"/>
Did you pay for child care while you worked, looked for work, or while a full-time student?	<input type="checkbox"/>
Did you pay any expenses related to the adoption of a child during the year?	<input type="checkbox"/>
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, attach the IRS letter.	<input type="checkbox"/>
Purchases, Sales and Debt Information	
Purchases, Sales and Debt Information	✓ if applicable
Did you start a new business or purchase rental property during the year?	<input type="checkbox"/>
Did you sell, exchange, or purchase any assets used in your trade or business?	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>
Did you purchase or sell a principal residence during the year?	<input type="checkbox"/>
Did you foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>
Did you acquire or dispose of any stock during the year?	<input type="checkbox"/>
Did you take out a home equity loan this year?	<input type="checkbox"/>
Did you refinance a principal residence or second home this year?	<input type="checkbox"/>
Did you sell an existing business, rental, or other property this year?	<input type="checkbox"/>
Did you lend money with the understanding of repayment and this year it became totally uncollectable?	<input type="checkbox"/>
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?	<input type="checkbox"/>
Income Information	
Income Information	✓ if applicable
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?	<input type="checkbox"/>
Did you receive any income from property sold prior to this year?	<input type="checkbox"/>
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>
Did you receive any disability income during the year?	<input type="checkbox"/>

Did you receive tip income not reported to your employer this year?	<input type="checkbox"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	<input type="checkbox"/>
Do you expect a large fluctuation in income, deductions, or withholding next year?	<input type="checkbox"/>
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?	<input type="checkbox"/>
Retirement Information	√ if applicable
Are you an active participant in a pension or retirement plan?	<input type="checkbox"/>
Did you receive any Social Security benefits during the year?	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	<input type="checkbox"/>
If yes, were any withdrawals due to a Federally declared disaster?	<input type="checkbox"/>
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	<input type="checkbox"/>
Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	<input type="checkbox"/>
Education Information	√ if applicable
Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?	<input type="checkbox"/>
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.	<input type="checkbox"/>
Did anyone in your family receive a scholarship of any kind during the year?	<input type="checkbox"/>
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	<input type="checkbox"/>
Did you make any withdrawals from an education savings or 529 Plan account?	<input type="checkbox"/>
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	<input type="checkbox"/>
Did you make any contributions to an education savings or 529 Plan account?	<input type="checkbox"/>
Did you pay any student loan interest this year?	<input type="checkbox"/>
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	<input type="checkbox"/>
Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?	<input type="checkbox"/>
Health Care Information	√ if applicable
Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent. If yes, attach any Form(s) 1095-B and/or 1095-C you received.	<input type="checkbox"/>
Did anyone in your family qualify for an exemption from the health care coverage mandate? Examples of exemptions include (but are not limited to) certain non-citizens, members of a health care sharing ministry, members of Federally-recognized Indian tribes, and exemptions requested from the Marketplace. If yes, attach the Exemption Certificate Number (ECN) or type of exemption.	<input type="checkbox"/>
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, attach any Form(s) 1095-A you received.	<input type="checkbox"/>
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is not included in your family?	<input type="checkbox"/>
Did you make any contributions to a Health savings account (HSA) or Archer MSA? Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	<input type="checkbox"/>
Did you pay long-term care premiums for yourself or your family?	<input type="checkbox"/>
Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 5498-QA you received.	<input type="checkbox"/>

Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received.	<input type="checkbox"/>
If you are a business owner, did you pay health insurance premiums for your employees this year?	<input type="checkbox"/>
Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, attach any Form(s) 1099-H you received.	<input type="checkbox"/>
Itemized Deduction Information	√ 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?	<input type="checkbox"/>
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.	<input type="checkbox"/>
Did you pay real estate taxes for your primary home and/or second home?	<input type="checkbox"/>
Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098 you received.	<input type="checkbox"/>
Did you incur interest expenses associated with any investment accounts you held?	<input type="checkbox"/>
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?	<input type="checkbox"/>
Miscellaneous Information	√ 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?	
Did you retire or change jobs this year?	<input type="checkbox"/>
Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?	<input type="checkbox"/>
Did you pay any individual as a household employee during the year?	<input type="checkbox"/>
Did you make energy efficient improvements to your main home this year?	<input type="checkbox"/>
Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?	<input type="checkbox"/>
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?	
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	
Did you receive correspondence from the State or the IRS? If yes, explain: _____	
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	
Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.	

Please complete the following information:

Name: _____

Address: _____

Phone Number: _____

Email: _____

Bank Routing Number: _____

Bank Account Number: _____