2017

Tax Questionnaire

REQUIRED - Complete, sign, and return.

Please complete this brief tax questionnaire and return to us in the enclosed envelope along with your PAPER TAX FORMS AND ANY OTHER PAPER DOCUMENTS. We will return them to you.

Please return no later than February 28, 2018.

Baker Sullivan Hoover PLC

2017 Tax Questionnaire

Yes* No *If Yes to any questions, please provide us with any related tax forms and more details on the last page.

Personal Information

☐ ☐ Did your marital status change during the year?

☐ ☐ Did your address change during the year?

Dependents

☐ ☐ Could you be claimed as a dependent on another person's tax return?

☐ ☐ Were there any changes in dependents?

☐ ☐ Do you have any children under age 18 with unearned income more than $1,050?

☐ ☐ Do you have any student children, aged 18-23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $1,050?

☐ ☐ Are any of your dependents required to file a tax return?

Healthcare

☐ ☐ Did you and your dependents have health care coverage for the full year? If yes, attach **Form 1095-A, 1095-B, or 1095-C**. If no, please provide additional information.

☐ ☐ Did you have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA)? If so, include all **Forms 1099-SA and/or 5498-SA**.

Retirement

☐ ☐ Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? If so, include all **Forms 5498 and/or 1099-R**.

☐ ☐ Did you transfer or rollover any amount from one retirement plan to another?

☐ ☐ Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?

☐ ☐ Did you withdraw any amounts from your IRA to pay for higher education expenses or acquire a principal residence? If so, provide us details.

Education

☐ ☐ Did you withdraw any amounts from a Coverdell Education Savings account or Qualified Education Program (Section 529) plan? If so, include **Form 1099-Q**.

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, include **Form 1098-T**.

☐ ☐ Did you pay any student loan interest? If so, include **Form 1098-E**.

Investments

☐ ☐ Did you buy or sell any stocks, bonds, or other investment property? If so, please include all **Forms 1099-B** and/or year-end tax statement from brokerage account.

☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please include settlement statement you received at closing.

Deductions and Credits

☐ ☐ Did you purchase any motor vehicles or boats in 2017? If so, provide sales tax paid.

☐ ☐ Did you make a qualified residential energy-efficient improvements or purchases involving solar, wind, geothermal, or fuel cell energy resources? If so, provide us with invoices you paid in 2017 along with the tax credit certificate received.

☐ ☐ Did you incur a loss because of damaged or stolen property greater than 10% of your income?

Miscellaneous

☐ ☐ Did you receive any disability income? If so, provide us with any forms you received, 1099's, etc.

☐ ☐ Did you pay an excess of $1,000 in any quarter or $2,000 during the year for domestic services performed in or around your home to individuals who could be considered household employees?

☐ ☐ Did you have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country?

☐ ☐ Was your home rented out for more than 14 days or used as a home office?

☐ ☐ Did you make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value more than $14,000 to any individual?

☐ ☐ Do you expect any changes (income, deductions, dependents, etc.) to occur in 2018? If so, please provide details.

☐ ☐ Were you notified or audited by either the IRS or a State taxing agency? Please provide us details.

☐ ☐ May the IRS discuss your tax return with your preparer?

☐ ☐ A PDF Client Copy of your return and e-file release form (or Filing Copy) will be placed in your Client Axcess Portal for your retrieval. Would you like a paper copy sent to you in addition to your Client Portal?

How would you like your tax documents returned?

☐ USPS ☐ Courier ☐ I will Pick-Up ☐ FedEx

Tax Form Reference Guide

Please send us all tax forms you receive. We would prefer originals so we can scan them using specialized software.

Income/Deduction	Tax Form
Wages	Form W-2
Interest	Form 1099-INT
Dividends	Form 1099-DIV
State or Local Tax Refunds	Form 1099-G
Sale of Stocks, Securities, Capital Assets	Form 1099-B
Miscellaneous Income	Form 1099-MISC
Retirement/Pension Distributions	Form 1099-R
Pass-thru Income (LLC's, S Corp., Partnership, Trust, Estate)	Schedule K-1
Unemployment Compensation	Form 1099-G
Social Security Income	Form SSA-1099
Mortgage Interest	Form 1098
Health Savings Account (HSA or MSA)	Forms 1099-SA and 5498-SA
Healthcare Coverage or Insurance	Forms 1095-A, B or C
Student Loan Interest	Form 1098-E
Tuition	Form 1098-T

Additional Information (also provide any details related to "Yes" answer from above)

Return this Tax Questionnaire and Paper Tax Forms no later than February 28, 2018

I have submitted this information for the sole purpose of preparing my tax return(s). This information is true, correct, and complete to the best of my knowledge. By sending my tax information to BSH, I am agreeing to the terms and conditions set forth by the Engagement Letter and Additional Terms and Conditions provided to me.

Taxpayer Signature

Date

Spouse Signature

Date

Baker Sullivan Hoover PLC