

# 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. For tax forms received electronically, please either print and mail us the tax forms or upload them to your Client Portal. We will return all documents to you.

**Please return no later than March 15, 2020.**

# 2019 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?

Did any of your dependents have unearned income over \$1,100 or earned income over \$12,200? If yes, the dependent is required to file a return.

Do you want us to prepare a tax return for your dependent if required?

Did you or your spouse pay for child care while you or your spouse worked or looked for work?

## **Healthcare**

Did you obtain healthcare coverage through the Marketplace? If Yes, include all **Form 1095-A**.

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 contribute 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 funds from a Coverdell Education Savings account or Qualified Education Program (Section 529) and use the funds for anything **other than** qualified education expenses? Please 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 or your spouse sell any securities, investment property, or cryptocurrencies (such as bitcoin), not reported on Form 1099-B?

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.

Did you or your spouse start, purchase, or sell a business, rental property, or farm, or acquire/sell any interest in any partnership or S corporation?

## **Deductions and Credits**

Did you purchase any motor vehicles or boats in 2019? 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 2019 along with the tax credit certificate received.

Did you or your spouse contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization?

If yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of \$10,000 or less.

### 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 \$2,100 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 have total mortgages incurred on or before December 15, 2017 on your first and/or second residence greater than \$1,000,000? Do you have total mortgages incurred after December 15, 2017 on your first and/or second residence greater than \$750,000?

Did you use funds from a Home Equity Line of Credit (HELOC) for anything **other than** to purchase, build, or substantially improve your residence?

Did you make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value more than \$15,000 to any individual?

Do you expect any changes (income, deductions, dependents, etc.) to occur in 2020? 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 Access 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 Other \_\_\_\_\_

If we have questions regarding your tax information, how would you like us to contact you? Email Text Phone

### 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
Student Loan Interest	Form 1098-E
Tuition	Form 1098-T

**Additional Information (also provide any details related to “Yes” answer from above)**

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**Return this Tax Questionnaire and Paper Tax Forms no later than March 15, 2020.**

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. I agree to the terms of the 2019 Tax Return Engagement Letter on file in my Client Portal if I 1) sign this tax questionnaire, 2) send 2019 tax data to prepare my 2019 tax return(s), or 3) authorize BSH to electronically submit my tax return to taxing authorities.

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date

