

## Interview Questionnaire

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**Unsure of something? Mark it and we will discuss it with you!**

NAME(s) \_\_\_\_\_ TAX YEAR 2019 or \_\_\_\_\_

*Please Print*

### Medical Insurance Information – Circle where appropriate

What is the source of your medical insurance?    Employer    MediCare    MediCal/Medicaid  
 Covered California/Marketplace\*    VA    Other \_\_\_\_\_

**\*If you purchased insurance from Covered California or other Exchange, please provide all 1095A documents. If anyone listed on your 1095A is not on your return, YOU NEED TO COORDINATE with them to properly allocate credits/insurance to get the best result for ALL !**

Did anyone in your household not have medical insurance this year? \_\_\_\_\_

(Though the “penalty” is zero, this question still needs to be asked.)

Is your medical insurance considered “high deductible” or HSA (Health Savings Account) qualified?

### Income Information – Please mark all types of income you have in the chart below and bring related documents:

W2 Wages	Sales of property/Stocks	Alimony: Divorce Date__/__/__
Tip Income	Interest	Child Support
1099R (Retirement/Pension/IRA)	Dividends	Government Assistance
Social Security	529 Plan distributions	Self Employed Business/Farm
Foreign Income	Disability/Paid Family Leave	Rental Property
Life Insurance	Prizes/Awards/SPIFFS	Unemployment
Savings Bonds	Jury Pay	Hobbies
1099 MISC	Class Action Settlements	Inheritance
Gambling	Election Official Pay	Other not on this list

### Please mark each of the following that you have done this year:

Made a retirement plan contribution not through your W2/wages (Please bring type and amount)	Buy/sell/exchange real estate (bring final settlement statements and any 1099s)
Participated in a Health Savings Account (bring account information)	Refinance/Modify a Mortgage (bring final paperwork)
Participated in an Employer Flexible Spending Arrangement for medical/dental	Adopted a child (bring final adoption paperwork and any APA documents)
Started or sold a business (please bring all relevant information)	Install Solar/windmills/geothermal heat pumps (bring receipt for tax credit)
Received a K1 from a trust, partnership or S Corporation (bring K1 and basis worksheets if we did not prepare)	Foreclosure/short sale (provide 1099Cs/1099As)
Cancellation of Debt (1099C required)	Bankruptcy
Bought a plug in or fuel cell vehicle (bring receipt for tax credit)	Use, buy, mine or trade virtual/ cryptocurrency (Bitcoin) – New Question on Tax Return!

**Itemized Deduction Information – Indicate which of these you have for this year and provide documentation for the deductions. SOD = State Only Deduction (no longer allowed for federal)**

Casualty or theft loss of more than 10% of your income?		Take work related education courses?- SOD	
Medical expenses more than 10% of your income? – check our website for a list of what counts in this category		Pay Union Dues – monthly and/or supplemental based on hours worked? – SOD	
Purchase car/truck/van/boat or other big ticket item subject to sales tax?		Drive for work without an opportunity for reimbursement? SOD	
Did you pay on a mortgage for your residence? (bring all 1098s)		Buy work tools or equipment? – SOD	
Make donations of cash or check ?		Are you required to wear a uniform? – SOD	
Did you make donations of more than \$250 at any one time (if so letters are required) ?		Travel away from home for work overnight for which you were not reimbursed? SOD	
Did you make any noncash contributions such as car, clothing, etc (“stuff”)?		Entertain clients/patients or other work or travel meals without reimbursement? SOD	
If you donated stuff, did you keep good records of the items/amounts?		Does your employer reimburse for expenses on a dollar-for-dollar basis?	
Did you incur any expenses for volunteer work including mileage?		Does your employer reimburse by giving you a flat amount, often on a paycheck?	
Did you pay any past state taxes?		Did you have job search expenses in the same profession? SOD	
Did you pay registration fees on a car?		Did you pay any investment expenses? SOD	

**Miscellaneous Information – Mark all that apply for this year and bring documentation:**

Buy/Sell online for more than just personal use?		Did you make any student loan payments? (bring 1098Es)	
Barter/trade items or services?		Did you make any estimated tax payments?	
If you work in a K-12 school, do you have educator expenses?		Did you fund an ABLE account for yourself or disabled relative?	
Did you make gifts valued at more than \$15,000 to any one person?		Are you a victim of identity theft/do you have an identity theft PIN from IRS?	
Did you move more than 50 miles for work? SOD		Did you get first time homebuyer credit in 2008? (\$7500 pays back \$500/yr)	
Are you involved in a foreign trust or foreign bank accounts?		Do you employ any household workers that are not businesses themselves?	
Did you receive correspondence from IRS or the State? Did you share this with us?		Do you have a family/living trust? If not, strongly consider one!	
Will someone in your household attend college this year or next?		Did you make any out-of-state purchases for which sales/use tax is due?	
Did you pay for any long term care insurance?		Did you receive any reimbursements from long term care insurance?(bring 1099LTC)	
Would you like to consider making a contribution to an IRA/Roth IRA or other retirement plan this year?		Did you receive any Advance Premium Tax Credit? (purchased insurance through an exchange, like Covered CA, at a discount?)	

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### Dependents - General

Please bring all income information for any children living in your home or away at school – we strongly encourage you to **NOT LET your kids file for themselves!** This often results in extra fees to the parents and delays in processing of returns as kids will claim themselves when they should not or make other mistakes.

### Dependents – Changes

Please describe any changes to your dependents from 2018 to 2019:

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### Dependents – Child Care

- Did you pay for any childcare? If Yes, please provide the name, tax ID, address and phone number as well as the amount paid for each provider, EVEN IF your employer reimbursed you!
- Did you receive any employer reimbursements for childcare? Y N (Box 10 of W2)

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**Would you like to make a tax deductible donation to one or more of the organizations we support? Even as little as a dollar can make a difference!**

- Haven of Peace (Women and children's shelter) \$ \_\_\_\_\_
- Stockton Impact Corps (small business support/education) \$ \_\_\_\_\_
- Puentes (community development) \$ \_\_\_\_\_
- YFC Point Break (Resources for youth in crisis) \$ \_\_\_\_\_
- Hope 4 Horses (Rescue and rehabilitation for horses) \$ \_\_\_\_\_

***\*We will match up to \$2,000.00 of total donations\****

Did your bank account(s) used for direct deposit change from last year? If YES please bring the routing number and account number for your new bank account.

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. Taxpayer Y N Spouse Y N

**Can you support all items on your tax return if you are audited? Y N**

**To the best of my knowledge, the above statements accurately reflect my transactions for the tax year. I have not withheld any information regarding income, nor will I hold Adding Sense to Your Dollars, Inc. dba All About Numbers responsible for anything I have not disclosed.**

\_\_\_\_\_ and/or \_\_\_\_\_  
Taxpayer Spouse

Date: \_\_\_\_\_