

Mark the Appropriate Boxes

Yes	No	Unsure	Small Business/Rental/Farm
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Do you own a Business? (Sch-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Do you have Rental Properties? (Sch-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Do you own and operate a Farm? (Sch-F)
Yes	No	Unsure	Income (Please provide all documents pertaining to the boxes marked YES)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. W2 for Wages or Salary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Tips
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. 1098-T for Scholarships/Tuition
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. 1099-INT for Interest/Dividends
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. 1099- NEC for Non-employee Compensation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Disability Income (1099-R)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. 1099-R for Retirement Income/Payments from Pension, IRA, 401(k), or 403(b)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. 1099-G for Unemployment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. SSA-1099 for Social Security Income
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10. Other Income (gambling, lottery, prizes, awards, Sch K-1, royalties) (1099-MISC)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11. Use Cash Apps such as PayPal or Venmo? (1099-K)
Yes	No	Unsure	Expenses- Paid by Taxpayer or Spouse
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Child Care Amount \$ _____ No. of Children with care _____ Name & Address of Provider _____ SSN or Federal Tax ID # of Provider _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Mortgage Interest, PMI, Property Tax, or Auto Excise Tax.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Donations to Charity.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Medical expenses not covered by Insurance nor Paid from an HSA or FSA.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Contributions to an IRA, Roth IRA, or SEP-IRA. Specify Type:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. For Supplies used as an eligible educator such as a teacher or counselor.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Student Loan Interest (1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Homeschool or Private School for K-12? Number of eligible children? _____
Yes	No	Unsure	Life Events
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Have a Health Savings Account (5498-SA, 1099-SA or W-2 with code W in box 12)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Purchase & Install energy-efficient home items? (Windows, Furnace, insulation) ** Visit www.energystar.gov/about/federal_tax_credits to verify eligibility.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Have EIC, Child Tax Credit, or AOC disallowed in a prior year? Which year? _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Did you receive, sell, send, or acquire financial interest in a virtual currency?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Do you own or control any Foreign Bank Accounts or Trusts?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Repayment of the 1st Time Homebuyer Credit taken in 2008?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Did you receive health insurance from the Marketplace/ACA/Obamacare)? 1095A
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9. Receive a letter from the IRS

Additional Comments about Your Tax Return: