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J & C TAX SERVICES

TAX QUESTIONNAIRE

Tax Year _____

Thank you for choosing J & C Tax Services. We look forward to seeing you. Please remember to bring the following to your appointment:

- 1) All wage statements and records of income earned income (W-2's, K-1's, all 1099's, W-2G, Unemployment, etc.)
- 2) Receipts and records of all contributions.
- 3) Mortgage Interest/taxes, closing statement on any property purchase/sold/refinanced last year (1098/HUD 1).
- 4) Your final pay stub if claiming deductions from work.
- 5) For new clients, a copy of you prior year tax return.
- 6) If you are claiming and new dependent, please bring name, birthday, and social security number.
- 7) If you are self-employed, fill out separate self-employed worksheet.
- 8) **If you had Covered CA the tax year: YOU MUST BRING US YOUR 1095-A FORM!**
- 9) **If you had private/employer insurance the tax year: YOU MUST BRING US YOUR 1095-B or C FORM!**

Please check any of the following that may apply to you:

- Any births, adoptions, marriages, divorces, or deaths in your household last year?
- Did you support anyone other than your immediate family? Did they live with you?
- Does everyone in your household have Health Insurance?
- Are you an employer who pays Health Insurance to your employees?
- Did you buy or sell a house or property last year?
- Did you start a new business, LLC, Partnership, or Corporation last year or close one?
- Did you/spouse/dependent attend college? If so, please form 1098-T if applicable and receipts for book/supplies?
- Did you receive any letters for the IRS or FTB regarding changes to your return?
- If you are due a refund, would you like to have it directly deposited into your bank account?
- If you owe money, would you like to have it directly debited from your bank account?
- Do you pay alimony due to agreement prior to 2019? \$ _____ To: _____ SSN: _____
- Did you pay interest on a student loan? TP \$ _____ SP \$ _____

BANK ACCOUNT INFORMATION

Name of Bank _____ Routing # _____ Acct # _____

PERSONAL INFORMATION

Home or Primary Phone Number: _____

Street Address _____ City: _____ St: _____ Zip: _____

	<u>Taxpayer:</u>	<u>Spouse:</u>
Name		
Occupation:		
Social Security #:		
Birthdate:		
Cell Phone:		
E-mail Address:		

Children and Dependents:

Full Name:	Date of Birth	Social Security #:	Relationship:	Mo @ Home	Income:

Estimated Taxes Paid: Prior years refund applied Federal \$ _____ State \$ _____

Date Paid		Federal	State	Date Paid		Federal	State
1 st Quarter				3 rd Quarter			
2 nd Quarter				4 th Quarter			
Paid with Extension by 4/15				Total Paid for Tax Year			

Individual Retirement Account Contributions:

Taxpayer's IRA Traditional Roth SEP/Simple HSA Contributed \$ _____
 Spouse's IRA Traditional Roth SEP/Simple HSA Contributed \$ _____

(Contributions can be made until Tax Day for the previous years taxes for IRA & Roth and until the extension due date for SEP IRA's)

WAGE INCOME (Bring all w-2's)		TP	SP	NON-EMPLOYEE INCOME (Bring all 1099's)		TP	SP

INTEREST INCOME (Bring all 1099's)		Amount	DIVIDEND INCOME (Bring all 1099's)		Ordinary	Qualified Cap Gain

OTHER INCOME and/or ADJUSTMENTS

	Taxpayer	Spouse
State tax Refund		
Alimony received		
Unemployment Compensation (Must bring 1099G)		
Social Security Received (Must bring SSA-1099)		
Partnerships/Retirement/IRA Distributions (Must bring all 1099R's K-1, Etc.)		
Stock Sales (Must bring all 1099's and all Stock Basis Info)		
Gambling Winnings (Must bring W-2G)		
Health Savings Account: HSA Distributions (Must Bring 1099-SA)		
Cancellation of Debt (Must bring 1099C)		
Other Income not Listed Above; Please Specify		

CHILD AND DEPENDENT CARE EXPENSES

Provider:	Provider:
Address:	Address:
City/State/Zip:	City/State/Zip:
SSN/EIN:	SSN/EIN:
Phone #: Amt Paid:	Phone #: Amt Paid:

SCHEDULE A

MEDICAL EXPENSES

Prescriptions		Health Insurance Premiums		Lab fees/hearing aids	
Doctors/Dentist		Long Term Care Ins	TP	SP	Glasses/Contacts/Lasik
Hospitals/Clinics		Ins Reimbursed	()	Medical Miles
Other Medical Equipment: (Please list)					

TAXES PAID

Real Estate Taxes Paid		Land or Other Property		Previous Year's Taxes Paid	
Vehicle License Paid	#1	#2	#3	#4	#5 Total
Luxury Tax (Boat Reg)		Sales Tax on Autos, Boats, etc	#1	#2	Total

HOME MORTGAGE LOAN INTEREST

#1		#2		Points Paid on New Home or Refi	Mortgage Insurance Premiums
#3		#4			
Mortgage Interest paid to a Person:	Name:	SSN:			
Address, City, St, ZIP				Amt Paid:	

CONTRIBUTIONS (Bring a detailed list along with donation receipts, appraisals, and/or letters from charities)

	Name:	Amt:	Name:	Amt:
Cash/Check Please List:				
Non-Cash Please List:				

UNREIMBURSED EMPLOYEE BUSINESS EXPENSES FOR "CALIFORNIA SCH A":

Professional/Union Dues		Schooling/Cont'd Education	
Potlucks, etc.		Professional Books & Journals	
Cell Phone		License/Credentials	
Internet		Business Gifts	
AAA/Costco/Sam's/Amazon Prime/Annual Credit Card Fees		Office Supplies	
Small Tools		Malpractice Insurance	
Safety: Shoes, Boots, Glasses, Lotions, Gloves		Physical Required	
Job Supplies, Uniform		Uniform Laundry/Cleaning	

Sales Representatives, Law Enforcement, Fire Fighters/Paramedics, Educators, Medical Professionals, and Self-Employed: Please fill out industry specific worksheets.

MISC DEDUCTION EXPENSES FOR "CALIFORNIA SCH A":

Timeshare		Alarm/Permit		Tax Prep Fees		Locks, Latches, Gates, Keys, Doors, Windows	
Storage Fees		Safe		Safety Deposit Box/PO Box		Shed/Shelving	
HOA Dues		Boat/Trailer Ins		Attorney Fees		Investment Fees	
Investment Subscriptions/Pubs		Boat/Trailer Cover		Cameras/Outdoor Lighting		Investment Travel	

OFFICE IN THE HOME ONLY (For Employees Only)

Business use Area (sq ft)		Mortgage Insurance		Lawn/Pool/Spa/Pest Service	
Total Area of Home (Sq ft)		Rent		Gas/Electric	
Mortgage Interest		Home Owners/Renters Insurance		Water/Sewer/Garbage	
Real Estate Taxes		Repairs/Maintenance		Wood/Pellets/Cable	

Vehicle Mileage (For Employees Only)

	Vehicle 1	Vehicle 2	Vehicle 3
Description of Vehicle Year, Make, and Model			
Date placed in Service			
Total Miles			
Total Business			
Total Commuting Miles			

Notes for your Preparer
