

Name: \_\_\_\_\_

**QUESTIONNAIRE- TO BE ANSWERED BY ALL CLIENTS:**

**Please bring to your appointment**

To help assure the accuracy of your tax return and that all possible tax deductions are taken, please complete the following questions.

- Yes No Do you wish to designate a part of your taxes to the Presidential Campaign Fund?
- Yes No Any births, adoptions, marriages, divorces, or deaths in your immediate family during 2017?
- Yes No Did you have any children with total investment income more than \$1050, that were under age 19 or full-time students under age 24 at the end of 2017?
- Yes No Will you need your tax return to fill out a Free Application for Student Aid (**FAFSA**) Form?
- Yes No Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, an S corporation, trust, or REIT, etc?
- Yes No Did you receive income for which you did not receive a Form W-2 or 1099?
- Yes No Did you use your car for business purposes (other than to commute to and from work)? Did you commute? between first and second jobs? If yes, complete page 3 of the organizer.
- Yes No Did you move because of a job change? If so, bring moving costs.
- Yes No Did you add any energy efficient improvements (insulation systems, exterior windows and doors, metal roofs) to your home?
- Yes No Did you buy a main home in 2017?
- Yes No Did you sell or gift any stock, real estate, land, or other property or have any become worthless? If yes, complete page 3 of the organizer and provide the final settlement statement for both the purchase and the sale.
- Yes No Did you sell any gold, old jewelry, or precious metals?
- Yes No Did you sell any items on EBay?
- Yes No Did you make a gift to any individual in excess of \$14,000?
- Yes No Does anyone owe you money for which you have exhausted all reasonable efforts to collect?
- Yes No Did you employ any household workers? (Specifically caregivers, nannies, etc.)
- Yes No Did you pay additional state tax last year because of an audit or filing of a late return?
- Yes No Did you make an internet purchase on which no state sales tax was collected?
- Yes No Did you have a casualty or theft loss which would exceed 10% of your income? If so, bring an itemized list including both original cost and value on date of loss.
- Yes No Did you contribute to a retirement plan, including a Roth IRA? What type of plan? \_\_\_\_\_
- Yes No Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Yes No Did you make contributions to a Health Savings Account (HSA) this year? (Do not mark "yes" for FSA)
- Yes No Did you have any foreign income or pay any foreign taxes?
- Yes No Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account that had a balance of \$10,000 at any point during the year?
- Yes No Did you receive a foreign gift or inheritance from someone in a foreign country or from a foreign entity?
- Yes No Have you ever had the Earned Income Credit denied?
- Yes No Did you claim the Homeowners' Credit in 2008 for which you are responsible for paying back each year?
- Yes No Did you have health insurance for you, your spouse, and all dependents for the entire year? If you did NOT have insurance for each month of 2017, please provide details of insurance coverage for each family member by month.
- Yes No If you bought health insurance through an exchange (ie. [www.healthcare.gov](http://www.healthcare.gov), [www.coveredca.com](http://www.coveredca.com)), please include in your tax information the Form **1095A** that the Health Insurance Exchange sent you. **Please bring any forms 1095-B or 1095-C received from an insurance company or employer**

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**SIGNATURE REQUIRED:**

To the best of my knowledge, the enclosed information correctly includes all income, deductions, and other information necessary for the preparation for this year's income tax returns and I have adequate records to substantiate data.

Taxpayer \_\_\_\_\_

Date \_\_\_\_\_

Spouse \_\_\_\_\_

Date \_\_\_\_\_

**2017 INCOME TAX WORKSHEET FOR MINISTERS ONLY**

**If applicable, please bring to your appointment**

**MINISTER'S INCOME (do not include non-ministry income)**

W-2 Wages Reported	\$ _____
1099 Misc. Salary Reported	\$ _____
Housing Allowance	\$ _____
Honorarium Received	\$ _____
Allowances ( <u>not</u> included in W-2/1099)	
Automobile	\$ _____
Professional Expenses	\$ _____
Social Security	\$ _____
Other: _____	\$ _____
Pension Received	\$ _____

**Have you opted out of Social Security? Yes \_\_\_\_\_ No \_\_\_\_\_**

**MINISTER'S HOUSING ALLOWANCE EXPENSES**

<u>Total Mortgage Payments Paid in 2017</u>	\$ _____
Property Tax ( <u>not</u> included in Mtg. Pymt)	\$ _____
Insurance ( <u>not</u> included in Mtg. Pymt)	\$ _____
<u>Total Rent Payments Paid in 2017</u>	\$ _____
Association Fees	\$ _____
Furnishings	\$ _____
Landscaping	\$ _____
Maintenance/Repairs	\$ _____
Improvements	\$ _____
Utilities (including base rate of phone, cable, satellite, & internet)	\$ _____
Other: _____	\$ _____
<b>TOTAL EXPENSES:</b>	<b>\$ _____</b>

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Note: Please ask the person issuing the W-2 or 1099 Misc. to provide you with an explanation of how the final salary number was figured. This should include all compensation received by you, including allowances by classification, but not reimbursements.

Please use the Miscellaneous Deductions Section on page 2 of the Income Tax Checklist for your ministerial expenses if your income was reported on a form W-2. Use the Self-Employed Business Income and Expense Section on page 3 if you received a form 1099-MISC.

**\*\*SEE REVERSE FOR ADDITIONAL QUESTIONS FOR ALL CLIENTS\*\***