2018 Individual Tax Questionnaire

It is extremely important that you thoroughly complete this questionnaire and return it to us as it is designed to identify potential tax savings and to create a complete and accurate tax return.

Submit the **completed** and **signed** 2018 Tax Questionnaire with your tax documents in one of the following three ways:

- Upload your information electronically through our secure system, SafeSend. You can find the link in our signatures OR send us an email at info@kevinshawcpa.com
- Fax to: 970-223-6509
- Mail/Deliver to: 1044 West Drake Road, Suite 201, Fort Collins, CO 80526

CONTACT INFORMATION: ***(Please complete even if you have provided us the same information in the past)***

TAXPAYER NAME: ________________________________ *EMAIL: ________________________________

SPOUSE NAME: __________________________________ *EMAIL: ________________________________

PRIMARY PHONE: T: ___________________________ S: _____________________________________

ADDRESS: ______________________________ CITY: ___________________ ST: ______ ZIP: ________

***Please do not list the same email address for taxpayer and spouse. For electronic signatures, our software requires different email addresses for taxpayer and spouse.**

TEXT MESSAGES:
We have the ability to send text notifications and reminders. We will only send a text message regarding the preparation of your tax return; we will not send marketing communications via text messaging.
To opt in to receive text messages, check here: ________
If your number is different than listed above, provide your preferred number: __________________________

PAPERLESS BILL:
Please provide your preferred email: ____
To opt out of paperless billing, check here: _________

FINAL TAX RETURN:
We will send you a copy of your final tax return in a secure email unless you do not have email or you ask us otherwise.

SIGNATURES REQUIRED:

The information provided in this document and it's addendums for preparation of my (our) tax return is complete and correct to the best of my (our) knowledge and belief. I (we) have adequate records to support the information provided above and in the addendums below. For married couples, both spouses must sign.

_____________________________________ _______________

Signature **Date**

_____________________________________ _______________

Signature **Date**

SHAW & ASSOCIATES
CPAs & FINANCIAL ADVISORS

<u>Please answer each question</u>. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions on the lines provided at the bottom of the page along with any additional information.

<u>QUESTIONS:</u>

		YES	NO
1.	If you are a new Shaw & Associates client this year, please complete the **<u>New Client Addendum on page 6.</u>**		
2.	Did you receive any notices from the IRS or any state tax authority during the past year regarding your taxes? **(Please provide a copy if you have not already sent one to us).**		
3.	Did you get married or divorced during 2018?		
4.	Do you have any dependents (including someone who is not your child but whom you supported)? If so, complete the **<u>Dependent Addendum on page 8</u>**. **In order to qualify for the child tax credit, other dependent credit, or earned income tax credit, <u>you must complete this addendum each year.</u>**		
5.	Did you pay for any child care so you and your spouse if married could work, look for work, or attend school, for any child under the age of 13? If so, complete the **<u>Child Care Addendum on page 6.</u>**		
6.	Did you or your spouse pay in 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 (housekeepers, maids, childcare providers, gardeners, etc.)?		
7.	Did anyone attend college during 2018? If so, please complete the **<u>Education Addendum on page 9</u>**.		
8.	Did you earn wages in 2018? If so, <u>include all W-2's.</u>		
9.	Did you have any realized earnings from investment accounts in 2018? This would include interest, dividends, and capital gains. If so, please complete the **<u>Investment Account Addendum on page 7.</u>**		
10.	Did you have any distributions from retirement accounts, including IRA's, pensions, or receive social security in 2018? If so, please complete the **<u>Investment Account Addendum on page 7</u>**.		
11.	Did you (or will you) make contributions to IRA accounts for 2018? If so, please complete the **<u>Investment Account Addendum on page 7.</u>**		
12.	Did you own any rental property? If so, please complete the **<u>Rental Property Addendum on page 13</u>**.		
13.	Were you self-employed, or did you own a business that does not file a separate tax return? If so, complete the **<u>Business Addendum on page 15.</u>**		

COMMENTS: ____

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Please answer each question. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions on the lines provided at the bottom of the page along with any additional information.

QUESTIONS CONTINUED:

		YES	NO
14.	Did you pay or receive any alimony in 2018 (do **NOT** include child support)? If so, how much? ______ Please specify if you **paid** or **received** the alimony: ______		
15.	Did you receive any unemployment compensation? If so, include Form 1099-G.		
16.	Was your entire family (taxpayer, spouse, and dependents) covered with minimum essential health care coverage (coverage meeting the shared responsibility requirement under the Affordable Care Act – including individual market policies, job-based coverage, Medicare, Medicaid, CHIP, TRICARE and certain other coverage) **for every single month of 2018?**		
16a.	• **If no**, please indicate for each person in your family (taxpayer, spouse, and dependents) which months in 2018 the individual did not have minimum essential health coverage. ______ ______		
16b.	• **If no**, did you have an exemption from coverage? If so, please describe your exemption and/or include a copy of your Exemption Certificate, if applicable. ______ ______		
17.	Did you or a family member (taxpayer, spouse, and dependents) enroll in health insurance coverage for 2018 through the Health Insurance Marketplace (Exchange)? If yes, please provide a copy of Form 1095-A. Please contact your health insurance provider if you have not received your form for 2018.		
18.	Did you pay premiums for a long-term care insurance policy? If so, please provide a copy of your annual bill paid in 2018. You may have to contact your insurance provider for this statement.		
19.	Did you contribute to a Health Savings Account (HSA) for tax year 2018? If so, please complete the **HSA Addendum on page 9**.		
20.	Did you pay any student loan interest? If so, include all 1098-E's.		
21.	Did you make any contributions to an education savings account? If yes, please complete the **Education Savings Addendum on page 9.**		
22.	Did you work in grades K-12 in any of the following roles: teacher, counselor, aide, or principal? If so, how much did you pay out of pocket for classroom expenses in 2018 that were not reimbursed? **Amount**:______		

COMMENTS: ______

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Please answer each question. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions on the lines provided at the bottom of the page along with any additional information.

QUESTIONS CONTINUED:

		YES	NO
23.	All taxpayers have the option each year to deduct either actual itemized deductions (mortgage interest, taxes, charity, etc.) or the standard deduction. Due to 2018 tax law changes, many more taxpayers will benefit from the standard deduction rather than the itemized deductions. We still encourage you to submit all your documents and expenses for the itemized deductions so that we can determine the best deduction for you. **If you would like to give us these documents and have us evaluate, answer yes to this question and please complete the Schedule A (Itemized Deductions) Addendum on page 16.** For 2018, the basic standard deduction is $12,000 (single or married filing separately); $18,000 (head of household); and $24,000 (married filing jointly).		
24.	Did you make any charitable contributions in 2018? If so, please note that, **although this is a Schedule A item, Colorado income tax filers could get a state tax deduction for charitable contributions if you take the standard deduction. Therefore, if you are filing a Colorado income tax return and your total 2018 charitable contributions were greater than $500, please complete this portion of the Schedule A Addendum on page 16 regardless of whether or not you plan to take the standard deduction. Please also complete this portion if you file a return in a different state and would like us to check if you can get a deduction on your state return.**		
25.	Did you **buy or refinance** a personal residence in 2018, including a second home? If so, **include the purchaser (or borrower) settlement statement**.		
26.	Did you **sell** any real estate in 2018, including a principal residence? If so, include the seller settlement statement and any additional selling costs not included on the settlement statement. Also, provide the original purchase date, cost, and a list of any capital improvements made during ownership if we would not have this from prior years.		
27.	Did you incur a casualty (flood, hurricane, tornado, fire, earthquake), disaster, or theft loss in 2018 in a **federally declared disaster area?** If so, we will follow up with you for the details.		
28.	Did you have any foreign income, foreign bank accounts, foreign trusts, or any other foreign financial activity or assets at any time during 2018?		
29.	Did you make any estimated tax payments (in addition to withholding from your wages) to the IRS or state for 2018 (including 4th quarter payments due in January 2019)? If so, please complete the **Estimated Tax Payments Addendum on page 7.**		
30.	Do you want to review your tax return before we E-file?		

COMMENTS: ____

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Please answer each question. If a question is not answered, we will assume it is not applicable to your current situation. If you are unsure, please note your questions on the lines provided at the bottom of the page along with any additional information.

QUESTIONS CONTINUED:

31.	**How would you like to receive your refund, if applicable?** Direct Deposit ☐ Mailed Check ☐ Applied to 2019 estimated taxes ☐ Ha, Ha! What refund? ☐
32.	If direct deposit, provide the following: **(even if we already have it)** • Bank Routing Number:____________________ • Bank Account Number:____________________ • Bank Name:____________________ • Is the bank account a checking ☐ or savings ☐ account? • Is the bank account a personal ☐ or business ☐ account? • Is the bank account a joint ☐ or individual ☐ account?

		YES	NO
33.	If you owe money, would you like to have it automatically withdrawn from your bank account? If so, provide the details above. We will automatically set your withdrawal date as of the due date of the return (generally April 15). If you prefer an earlier date, what is the preferred date?:____________________		

COMMENTS: ____

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ADDENDUMS:

Please see our Addendum list for additional information from above questions.

2018 Addendums

There are 2 addendums on this page:
New Client and Child Care

New Client Addendum:

Taxpayer Name: ____ SSN: __________________________

Driver License (DL) #:_____________________________ DL State of Issue: ________________________

DL Issue Date: __________________________ DL Expiration Date: ______________________________

Date of Birth: _____________________________ Occupation: __________________________________

Spouse Name: ____ SSN: __________________________

Driver License (DL) #:_____________________________ DL State of Issue: ________________________

DL Issue Date: __________________________ DL Expiration Date: ______________________________

Date of Birth: _____________________________ Occupation: __________________________________

		YES	NO
1.	Did you include your prior year FEDERAL AND STATE tax returns?		
2.	Do you want the IRS to contribute $3 per taxpayer to the Presidential Campaign Fund? This does not affect your tax liability and does not go to a specific candidate.		
3.	Did you dispose of any vehicles during 2018 that you used for any business purpose, rental property, job, etc. that you deducted on your taxes in the past? If yes, please provide details including sale/disposal date and sale/trade in amount.		
4.	Did you receive a First-Time Homebuyer credit on your 2008 tax return, for a property that you still owned in 2018? If so, provide a copy of your 2008 income tax return.		

Child Care Addendum:

Please complete if you paid for child care so you and your spouse if married, looked for work or attended school.

1. Name of child care provider: ____
2. Address of child care provider: __________________________City: ___________St: ____Zip: _______
3. Tax Identification Number of child care provider (social security number or federal identification number) **If you do not provide this, you cannot take this credit**: _____________________________________
4. Name of each dependent for whom child care was paid: ______________________________________
____
5. Amounts paid to child care provider **PER DEPENDENT**:_____________________________________
____

COMMENTS: ____
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There are 2 addendums on this page:
Estimated Tax Payments & Investment Account

Estimated Tax Payments Addendum:

Please complete if you made any estimated tax payments (in addition to withholding from your wages) to the IRS or State for 2018 (including 4th quarter payments due in January 2019).

IRS:

1st Quarter Date Paid: ______________________ Amount Paid: __________________________

2nd Quarter Date Paid: ______________________ Amount Paid: __________________________

3rd Quarter Date Paid: ______________________ Amount Paid: __________________________

4th Quarter Date Paid: ______________________ Amount Paid: __________________________

Additional Payments: ____

STATE: (If more than one state, please list each state separately)

1st Quarter Date Paid: ______________________ Amount Paid: __________________________

2nd Quarter Date Paid: ______________________ Amount Paid: __________________________

3rd Quarter Date Paid: ______________________ Amount Paid: __________________________

4th Quarter Date Paid: ______________________ Amount Paid: __________________________

Additional Payments: ____

Investment Account Addendum:

Please complete if you had any investment activity during 2018.

		YES	NO
1.	Did you have any interest or dividend income? If so, include all 1099- INT's, 1099-DIV's, and 1099-Combined's/Consolidated's.		
2.	Did you sell any stocks, bonds or mutual funds (do not include any activity within a 401k, IRA's, or any other tax protected account)? If so, include all 1099-B's and 1099 Combined's/ Consolidated's.		
3.	Did you make any contributions to a Traditional ______ or Roth ______ IRA for 2018? If so, include Form 5498 or provide the contribution amount.		
3a.	• Do you want to make a contribution prior to filing the 2018 tax return (can be made until 4/15/19 for 2018 tax year)? Traditional IRA: ______ Roth IRA: ______		
4.	Did you receive any retirement plan (401k, IRA, etc.) or annuity distributions (**took money out of your retirement account**)? If so, include all 1099-R's.		
5.	Did you receive any social security benefits? If so, include all 1099- SSA's.		

COMMENTS: ____
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There is 1 addendum on this page:
Dependent

Dependent Addendum:

Please complete if you had any dependents for 2018.

		YES	NO
1.	Do you need to add or remove any dependents for 2018?		
1a.	• **If yes**, indicate who needs to be removed, or provide the name, date of birth, relationship, and social security number of the new ones. ____ ____ ____		
2.	For any dependents between the ages of 19 and 24 in 2018, were they a full-time student (more than 1/2 time) for a part of at least 5 months during the year?		
3.	Did your dependent child(ren) live with you more than half of 2018? Temporary absences for school, vacation, or medical care count as time lived with you.		
3a.	• **If yes**, have you released the dependency claim for 2018 for any of your children to another person (such as the other parent)? Please list which of your children you have released the dependency claim for 2018. ____ ____ ____		
3b.	• **If no**, do you have an active Form 8332 Release/Revocation of Claim to Exemption for Child by Custodial Parent signed by the custodial parent (the parent the child lived with more than half of 2018)? We will need to attach this to the tax return in order to get any tax benefit for this dependent.		
4.	Do you have dependents that must file a tax return? Generally, if any dependent received any income totaling $12,000 or more, had unearned income (interest, dividends, etc.) in excess of $1,050 in 2018, or $400 or more of self-employment income, they need to file a return. Note, if they are not required to file but had federal or state withholding it may still be beneficial for them to file. Let us know if you would like us to analyze this.		
4a.	• If a dependent's return is necessary, do you want us to file the return?		

COMMENTS: ____
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There are 3 addendums on this page:
HSA, Education Savings, and Education

HSA Addendum:

Please complete if you made any contributions to or withdrawals from your Health Savings Account in 2018.

		YES	NO
1.	Provide the total amount you and/or your spouse contributed, or include Form 5498-SA. (do not include contributions made by your employer on your behalf through your payroll) for 2018.________________		
1a.	• If you made HSA contributions, was the health insurance policy an individual ________ or a family_____ plan? (Please check one)		
2.	If you have not yet made the maximum contribution for 2018, do you want to make an additional contribution prior to filing the 2018 tax return (can be made until 4/15/19 for 2018 tax year)? If so, how much? ____		
3.	Did you withdraw money from an HSA? If so, include all 1099-SA's.		
4.	Were all funds withdrawn used for qualified medical expenses?		

Education Savings Addendum:

Please complete if you made any contributions to an education savings account in 2018.

		YES	NO
1.	Did you make contributions to any **Colorado** 529 tuition savings plan? If so, provide the 2018 year-end statement for your Colorado 529 tuition savings plan account(s). Keep in mind the only types of plans that qualify for the Colorado deduction are administered by CollegeInvest, which include: Direct Portfolio College Savings Plan, Scholars Choice Colleg Savings Program, Smart Choice College Savings Plan, and Stable Value Plus College Savings Plan.		
2.	If you are not a Colorado resident and you made contributions to a 529 tuition savings plan, please check yes and provide us with your year-end statement.		

Education Addendum:

Please complete if anyone attended college during 2018 and include all Form 1098-T's.

		YES	NO
1.	Did the student receive scholarships or grants? If so, please indicate amounts received **(if not provided on Form 1098-T)**.____		
2.	Did the student or taxpayers receive any distributions from a qualified tuition program (529 plan, Coverdell, etc.)? If so, please provide Form 1099-Q**.**		
3.	Amounts **PAID** in 2018 (paid means cash, check, credit card or funds borrowed that will need to be repaid; it does not mean scholarships). Please note that Box 2 on Form 1098-T reflects amounts **billed** during the year, not **paid** during the year:		
3a.	• Tuition & Fees **PAID** in 2018		
3b.	• Required Course Materials (books and supplies) **PAID** in 2018		

COMMENTS: ____
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There is 1 addendum on this page:
Purchase of Rental Property

Purchase of Rental Property Addendum:

If you purchased rental property during 2018, please complete the following:

NOTE: There are certain items included in a rental property purchase that can be depreciated over a shorter period of time than the building. Although this step is optional, by identifying the items below we can maximize the current year tax deductions for your property.

Please provide copies of the purchase closing statement of any real property purchased in 2018. Also, provide copies of any refinancing settlement statements if you refinanced the property after purchase.

Please provide the **value at purchase** of the following items in the rental property purchased:

Refrigerator:
Stove:
Oven:
Dishwasher:
Microwave:
Washer:
Dryer:
Flooring – Tacked Down Carpet and/or Vinyl only:
Window Coverings:
Hot Water Heater:
Furnace:
Air Conditioner:
Roof:
Landscaping:
Other (please describe):

COMMENTS: ____

There is 1 addendum on this page:
Home Office

Home Office Addendum:

*If the taxpayer or spouse has a **qualified** home office, please complete the following (include the total amount of each expense; we will calculate the home office portion). If you do not know what qualifies, please ask us.*

If you would prefer to use the IRS standard home office deduction of $5/square foot (maximum of $1,500), please indicate and do not complete the remainder of this addendum.

I want to use the standard home office deductions: Yes ____ No ____ Sq. Ft. of office space: ___________

2018 Mortgage Interest:
2018 Property Taxes:
2018 Rent Paid (if you don't own the home):
2018 Utility Costs (Electric, Gas, Water, Sewer, Trash):
2018 Property Insurance Costs:
2018 Maintenance Expenses:
2018 Repairs:
2018 HOA Fees:
2018 Capital Improvements and/or Appliances **(include description, date in service, and amount)**:
2018 Other Home Office Expenses (please describe):

If we have not deducted a home office for you in the past or if you have changed home office or total home square footage please provide the following:

- Date home office first used: ____
- Square footage of the space used solely for business: ___________________________________
- Total square footage of your home: ____
- If this is a **new** home office, purchase price of home plus cost of major improvements:___________
  ____

COMMENTS: ____
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There is 1 addendum on this page:
Noncash Charitable Contribution

<u>Noncash Charitable Contribution Addendum:</u>

If your cumulative noncash charitable contributions for 2018 were greater than $500, specific information regarding each donation is required to be reported on your tax return. Please provide the details below for your noncash charitable contributions ONLY if the total for 2018 was greater than $500. If you made more than three noncash charitable contributions, attach additional copies of this page.

Noncash Charitable Contributions 1:

Charity Name: ____ Date: ________________
Charity Address: ________________________City:______________St:______Zip:____________
Fair Market Value of Items Donated: ____
Description of Items Donated: ____

Noncash Charitable Contributions 2:

Charity Name: ____Date: ________________
Charity Address: ________________________City:______________St:______Zip:____________
Fair Market Value of Items Donated: ____
Description of Items Donated: ____

Noncash Charitable Contributions 3:

Charity Name: ____ Date: ________________
Charity Address: ________________________City:______________St:______Zip:____________
Fair Market Value of Items Donated: ____
Description of Items Donated: ____

COMMENTS: ____
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There is 1 addendum on this page:
Rental Property

Rental Property Addendum:

*Please complete if you owned rental property (not reported on a separate business tax return) during the year (**and have not already provided records for the properties**). Also, please include any 1099's & 1098's received and any settlement statements for purchases/refinances/sales that occurred in 2018. **If you have more than one rental property, please copy this page and provide separately for each rental property**:*

If you purchased rental property during 2018, please complete this Addendum and the **Purchase of Rental Property Addendum on page 10**.

2018 Total Rent Received:
2018 Advertising:
2018 Cleaning & Maintenance Expenses:
2018 Property Insurance Costs:
2018 Management Fees:
2018 Mortgage Interest:
2018 Mortgage Insurance (not the same as property insurance):
2018 Repairs:
2018 Property Taxes:
2018 Utility Costs (Electric, Gas, Water, Sewer, Trash):
2018 HOA Fees:
2018 Security Deposits Received (if not included in rent received amount):
2018 Security Deposits Returned:
2018 Other Expenses (please describe):
2018 Capital Improvements and/or Appliances (include description, date in service, and amount):

Please provide the following information:

- Total number of 2018 personal use days including days rented to family/friends below market rates (do not include repair days listed below): ____
- Total number of 2018 repair days (any day you spent working substantially full time repairing and maintaining the rental property): ____
- Total number of days rented in 2018: ____
- How is this property owned (individually, joint tenancy, partnership, single-member LLC, multi-member LLC, or other)? ____
- Did you incur any mileage on your vehicle while operating your rental property? If so, please complete the **Business Vehicle Addendum on page 14.**

COMMENTS: ____
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There is 1 addendum on this page:
Business Vehicle Information

Business Vehicle Information:

The IRS is enforcing more stringently their requirements for detailed mileage records that support business use of vehicles. It is the responsibility of the business owner to have these records available upon the request of the IRS. While we do not require that you provide us with these detailed records, it is imperative that you have them. If you use unsubstantiated estimates, you run the risk of the deduction being disallowed. If you have more than two vehicles used for business, attach additional copies of this page. Please summarize your actual business vehicle use below:

Do you have documentation for the vehicle information provided below? Yes_______ No________
If so, is it written? Yes_______ No________

Vehicle 1:
Year: ___________ Make: _________________ Model: ____________ Date in service: _______________
of **total** miles (Business and Personal Combined) for Jan. 1, 2018 – Dec. 31, 2018:__________________
of **business** miles for Jan. 1, 2018- Dec. 31, 2018:_______________________

For any vehicle NOT deducted using the standard mileage rate, provide a summary of additional 2018 expenses (gas, lease payments, insurance, registration/license, repairs/maintenance, etc.) **If not already in your books.**

____
____

Vehicle 2:
Year: ___________ Make: _________________ Model: ____________ Date in service: _______________
of **total** miles (Business and Personal Combined) for Jan. 1, 2018 – Dec. 31, 2018:__________________
of **business** miles for Jan. 1, 2018- Dec. 31, 2018:_______________________

For any vehicle NOT deducted based on the standard mileage rate, provide a summary of additional 2018 expenses (gas, lease payments, insurance, registration/license, repairs/maintenance, etc.) **If not already in your books.**

Did you dispose of any vehicles during 2018 that you used for any business purpose, rental property, job, etc. that you deducted on your taxes in the past? Yes_______ No________

If yes, please provide details including sale/disposal date: _____________ and sale amount: ____________

COMMENTS: ____
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There is 1 addendum on this page:
Business

Business Addendum:

*Please complete if you are self-employed or own a business that does not file a separate tax return **(you do not need to complete this is you already filled out a business tax questionnaire for your business).***

		YES	NO
1.	Provide to us an accountant's copy of your books with a 1/1/19 dividing date or a summary of your income and expenses for the year.		
2.	Did the business purchase any fixed assets in 2018? If yes, please provide details including description, purchase date, and purchase amount **(if not already detailed in your books).** ________________________________		
3.	Does the business have a retirement plan (401(k), solo 401(k), SEP, Simple IRA, etc.)?		
3a.	• **If yes**, has the owner made any current year contributions on behalf of him/herself?		
3b.	• **If yes**, will there be any additional contributions for 2018 before the tax return is filed? If so, how much? ______________________		
3c.	• **If no**, does the business owner want to make a contribution for 2018 or create a plan before the tax return is filed?		
4.	Did the business owner use personal funds to pay for any business items in 2018 **that are not recorded in your books**? If so please include a summary by expense category.		
5.	During 2018, did the business owner have self-employed health insurance for the owner and/or owner's family? Self-employed health insurance includes premiums paid by your business or from personal funds. It **does not** include any payments made through other employers' plans or to health sharing ministries such as Medishare or Liberty.		
5a.	• **If yes**, at any time during 2018 was the business owner or his/her spouse eligible for group health insurance through another employer?		
5b.	○ If no, please provide the total health insurance premiums paid in 2018 for the business owner and family (if not already detailed separately in your books). This could include dental, vision, Medigap, and/or COBRA but not payments to health sharing ministries such as Medishare or Liberty.______________________		
6.	Did the business have any foreign income, foreign bank accounts, foreign trusts, or any other foreign financial activity or assets at any time during 2018?		
7.	Did the business have any sales, employees, contract labor, or assets in any state other than the business's home state in 2018?		
8.	Did the business make any payments in 2018 that would require it to file 1099 Form(s) (1099-MISC, 1099-INT, etc.)? **If you are unsure of the 1099 requirements, please contact us, as IRS fines can be substantial.**		
8a.	• If so, did the business file all required 1099 Form(s) for 2018?		
9.	Did you use a vehicle in this business? If so, please complete the **Business Vehicle Addendum on page 14.**		
10.	Did you use a **qualified** home office in this business? If so, please complete the **Home Office Addendum on page 11.**		

COMMENTS: ____
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There is 1 addendum on this page:
Schedule A (Itemized Deductions)

Schedule A (Itemized Deductions) Addendum:

Please complete only if you would like us to determine whether your itemized deductions are greater than your standard deduction or your total charity exceeds $500 for the tax year.

		YES	NO
1.	Did you make any cash charitable contributions (cash, check, or credit card in 2018)? If so, provide us with a summary of these contributions. Note, although you do not need to provide us with the receipts, you are required to have a receipt in your records for any cash contribution > $250.		
2.	Did you make any noncash charitable contributions (property, clothing, etc.) in 2018? If so, provide us with the total dollar amount. Note, if the total of all of your noncash charitable contributions were greater than $500, complete the **Noncash Charitable Contribution Addendum on page 12.**		
3.	Did you incur any mileage on your vehicle for charitable purposes in 2018? If so, how many miles? ____		
4.	Did you incur any out of pocket medical costs (not reimbursed by insurance or HSA Withdrawals)? If so, provide at least an estimate of the total amount paid in 2018. Medical costs are limited as to deductibility, so we can determine from your estimate if we think the medical costs are in excess of IRS limits. If it appears that medical costs may be deductible, we will request more specific information. ______________________________		
5.	Did you incur any mileage on your vehicle for medical purposes during 2018 that you did not reimburse from your HSA account? If so, how many miles? _________________		
6.	Did you make payments for health insurance in 2018 that were not through an employer pre-tax group plan? If yes, provide total premium payments, including those for dental, vision, Medigap, and COBRA coverage for all taxpayers and dependents. __________		
7.	Did you incur mortgage interest on your principal residence or second home? If so, include all 1098 Mortgage Interest statements. **Starting for 2018 taxes, the mortgage interest deduction rules have changed, so it is imperative that you answer the next 3 questions.**		
8.	If your mortgage(s) originated **before 12/15/17,** was the combined total of all your mortgage balances (first and second home only, not rental or business property) greater than **$1,000,000** at any time during the year? Make sure to include first and second mortgages, as well as home equity loans. If so, your mortgage interest deduction may be limited. **Please indicate on the 1098 or in the details at the bottom of this page the 1/1/18 and 12/31/18 balance on all such mortgages.**		

COMMENTS: ____
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There is 1 addendum on this page:
Schedule A (Itemized Deductions) CONTINUED

Schedule A (Itemized Deductions) Addendum CONTINUED:

Please complete only if you would like us to determine whether your itemized deductions are greater than your standard deduction or your total charity exceeds $500 for the tax year.

		YES	NO
9.	If your mortgage(s) originated **on or after 12/15/17**, was the combined total of all your mortgage balances (first and second home only, not rental or business property) greater than **$750,000** at any time during the year? Make sure to include first and second mortgages, as well as home equity loans. If so, your mortgage interest deduction may be limited. **Please indicate on the 1098 or in the details at the bottom of this page the 1/1/18 and 12/31/18 balance on all such mortgages.**		
10.	If you have any mortgages (first or second mortgage, including a home equity loan), on a first or second home that did not result from the purchase or improvement of the home that is securing that mortgage (in other words, you refinanced and took cash out to pay for education, vacation, purchase of a car, etc.), your interest deduction may be limited. Tell us which mortgage this applies to, and your tax preparer will tell you what additional details we need.		
11.	Is the fair market value of your home less than the combined total of all mortgage balances on that home?		
12.	Did you pay property taxes for any real estate? If so, provide amount paid in 2018 (unless already included on 1098 mortgage interest statement).		
13.	Did you purchase a vehicle, boat or any other large item, other than real estate? If so, include the purchase statement or indicate the amount of sales tax you paid in 2018.		
14.	Did you include your auto registration paid in 2018? Please note the deductible portion is not equal to the total registration expense that you paid. Please provide us with the actual registration form (probably in your auto's glove box) or the tax paid amount only. The tax portion paid is listed as **"own tax"** and **"prior O.T."** and is located on the back side of one copy of the Colorado auto registration.		

COMMENTS: ____