Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—enter "?" if unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?			
	Yes	No	Did you pay or receive alimony in 2018? *Paid/Received*	*Recipient's SSN*		
	Yes	No	Did you have health insurance for you, your spouse, and all dependents for the entire year?			
	Yes	No	Did you purchase health insurance through a public exchange?			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?			
	Yes	No	Have you paid alternative minimum tax (AMT) in previous years?			
	Yes	No	Did you pay anyone for domestic services in your home?			
	Yes	No	Did you purchase a new energy-efficient car, truck, or van?			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?			
	Yes	No	Were you a citizen of or lived in a foreign country?			
	Yes	No	Do you own or have financial interest in a foreign bank or financial account?			
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? *Designee's name* *Phone number* *PIN (any five digits)*			
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2018? *(Provide statement for other expenses.)*			
	Yes	No	Were any children attending college?	*Year in college*	Paid by you: *Tuition*	*Student loan interest* / *Books*
					Paid by student: *Tuition*	*Student loan interest* / *Books*
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			Student		*Amount paid*	
			Name and address of school			
	Yes	No	Did you pay for child or dependent care so you could work or go to school? *(add statement if needed)*			
			Name of provider		*EIN or SSN*	
			Address		*Amount paid*	
	Yes	No	Do you have any children who earned more than $2,100 of investment income?			
	Yes	No	Did you make any contributions to a 529 plan in 2018?			
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2018?	Traditional IRA	Roth IRA	
	Yes	No	Did you roll over any amounts from a retirement account in 2018?			
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?			
	Yes	No	Did you receive any income from an installment sale?			
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2018?			
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2018?			
DEDUCTIONS	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.			
	Yes	No	Did you pay sales taxes on a major purchase in 2018, such as a vehicle, boat, or home?			
	Yes	No	Did you make any charitable contributions in 2018?			
BUSINESS	Yes	No	Did you work from a home office or use your car for business?			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? (Provide closing statement)			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.			

State information Full-year resident Part-year resident Nonresident

States of residence during 2018 and dates

School district Do you rent or own your home? Rent Own