

# JK ASSOCIATES, LLC, TAX & CONSULTING - 2018 Tax Year Interview Sheet

Taxpayer/Spouse: \_\_\_\_\_ Date: \_\_\_\_\_

Here is a list of questions we ask during your annual tax interview. Not all questions apply to all clients. If you are dropping off your tax documents and not meeting with us, please answer the questions and we will follow up with you. If you are coming in for a meeting, answering these questions beforehand will speed up the meeting.

IF YOU ANSWER 'YES' TO ANY QUESTION, PLEASE PROVIDE DOCUMENTS and EXPLANATIONS. If more space is needed, use the last page or attach a separate sheet. If you are in doubt about the answer, please check the "Not Sure" box so we can discuss the issue with you. If your personal return includes Schedule C or E, please also complete our Business 2018 Interview Sheet.

PERSONAL INFORMATION		YES	NO	NOT SURE
1	Do you have any changes in dependents, marital status or address from your prior tax return?			
2	Do you have children under age 24 with unearned income of more than \$950?			
3	Were you notified by the IRS or state taxing authority of any changes in prior year returns?			
4	Did you make gifts of more than \$15,000 to any individual?			
5	Could you be claimed as a dependent by someone else?			
6	Do you have anyone living with you or supported by you that you are not claiming as a dependent?			

DO WE HAVE ALL YOUR INCOME?		YES	NO	NOT SURE
7	Did you receive unemployment compensation? If yes, provide 1099-G			
8	Do you and/or your spouse (if applicable) have self-employment income?			
9	Did you receive any hobby income or income from odd jobs (such as jury duty, tutoring, babysitting) or sell items at homes or online (other than personal items at no profit)?			
10	Did you engage in any bartering transactions?			
11	Do you have gambling or lottery winnings (not just money)? If so, please provide documentation.			
12	Did you have any debts cancelled, forgiven or refinanced during 2018?			
13	Did you receive any tip income not reported to your employer?			
14	Did you rent out a home (such as through AirBnB)?			
15	Did you have any withdrawals from a 529 plan or a HSA?			
16	Did you pay or receive alimony or child support?			
17	Did you receive any other income not reported to us that may be taxable?			

DID WE FIND ALL YOUR TAX BREAKS?		YES	NO	NOT SURE
18	Did you make any large purchases, such as motor vehicles and boats, subject to sales tax?			
19	Did you have any transactions pertaining to a health savings account (HSA)?			
20	Did you have an outstanding home equity loan with a balance greater than \$100,000?			
21	Did you pay any home equity or other home loan interest for funds <b>not used to acquire or improve</b> your principal residence or second home?			
22	Did you pay real estate taxes? Please provide documentation.			
23	Are/were you a law enforcement or public safety officer?			
24	Did you have significant (more than 7.5% of your income) out-of-pocket medical expenses?			
25	Did you pay for long-term care insurance this year? If so, your premium: \$ _____ Spouse's premium (if applicable): \$ _____			
26	Did you pay any student loan interest in 2018?			
27	Did you make any Qualified Charitable Donations from your IRA?			
28	Did you pay for child care for a dependent 12 years old or younger while you worked, looked for work, or attended classes? If YES, we require the provider EIN or SSN and address/phone.			

