

## 2015 INCOME TAX QUESTIONNAIRE

Please answer each question as accurately as possible. The information you provide will help ensure the accuracy of your tax returns (reducing the likelihood of audits, interest, and penalties), and will assist in ensuring that you receive all deductions for which you are qualified (saving you money).

If you were 65 or over in 2015 and think you may qualify for the real estate tax assessment freeze (income limitation of \$55,000) or the Illinois Circuit Breaker form for 2015 check here [ ].

\_\_\_\_\_  
Taxpayer Name

\_\_\_\_\_  
Spouse Name

\_\_\_\_\_  
Street Address/City/State/Zip Code

\_\_\_\_\_  
Phone #

\_\_\_\_\_  
Email Address

### GENERAL

	<u>YES</u>	<u>NO</u>	<u>N/A</u>	<u>NOT SURE</u>
1. Have you had a change in filing status since last year? (ex. married, divorced, widowed, legally separated)	_____	_____	_____	_____
2. Has your address changed from the address shown on last year's tax return?	_____	_____	_____	_____
3. Is your social security number correct on your form W-2, 1099, 1098 etc.?	_____	_____	_____	_____
4. Did you purchase, sell, or refinance your principal home or a second home, or take out a home equity loan?	_____	_____	_____	_____
5. Did you purchase any motor vehicles, boats, or home building materials in 2015? If so, please provide documentation showing the sales tax paid.	_____	_____	_____	_____
6. Did you make any purchases in 2015 for which you did not pay sales tax or paid less than 6.25% sales tax?	_____	_____	_____	_____
7. Did you make any estimated income tax payments for 2015? a. Were any of the estimated payments paid late?	_____	_____	_____	_____
8. Did you participate in a health savings account (HSA)? If so, please provide documentation.	_____	_____	_____	_____
9. Did you pay any medical or long term health care insurance premiums (including Medicare supplements) or expenses?	_____	_____	_____	_____
10. Do you have more than \$10,000 in a foreign bank account or did you have foreign income?	_____	_____	_____	_____
11. Are you an elementary or high school teacher?	_____	_____	_____	_____
12. Would you like direct deposit/withdrawal of your 2015 refund/balance? (NOTE: refunds can be split between as many as 3 different accounts, including IRAs)	_____	_____	_____	_____
13. Did you have any debt cancelled (credit card or other) If you received a 1099-C form, please provide it to us.	_____	_____	_____	_____
14. Were you or anyone in your family a target of identity theft the past 5 years? If so, were you issued a PIN by IRS?	_____	_____	_____	_____

**(OVER)**

<u>YES</u>	<u>NO</u>	<u>N/A</u>	<u>NOT SURE</u>
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**DEPENDENTS**

- |   |       |       |       |       |
|---|-------|-------|-------|-------|
| 15. Have you had a change in dependents since last year?<br>(ex. have/adopt a baby, have a child reach age 24, etc.)    | _____ | _____ | _____ | _____ |
| 16. Did any dependents under age 24 have income?<br>(Please provide information for any who reside with you)            | _____ | _____ | _____ | _____ |
| 17. Did you pay over \$250 in education expenses to a private<br><b>Illinois</b> elementary or secondary school?        | _____ | _____ | _____ | _____ |
| 18. Did you pay into a college savings plan (Sec 529)?  | _____ | _____ | _____ | _____ |
| 19. Did you, your spouse or a dependent pay college tuition<br>expenses (not room/board) or interest on a student loan? | _____ | _____ | _____ | _____ |

**INCOME**

- |   |       |       |       |       |
|---|-------|-------|-------|-------|
| 20. Are the figures on your W-2 & 1099 forms correct or<br>reasonable?                            | _____ | _____ | _____ | _____ |
| 21. Did you have any other income not reported on<br>Form W-2 or 1099?                            | _____ | _____ | _____ | _____ |
| 22. Did you engage in any bartering/trading during the year?                                      | _____ | _____ | _____ | _____ |
| 23. Did you receive any court awards during the year?   | _____ | _____ | _____ | _____ |
| 24. Did you pay or receive alimony during the year?   | _____ | _____ | _____ | _____ |
| 25. Did you receive a refund from a state tax return last year?                                   | _____ | _____ | _____ | _____ |
| 26. Did you receive any unemployment benefits in 2015?  | _____ | _____ | _____ | _____ |
| 27. Did you receive any social security benefits or disability<br>income in 2015?                 | _____ | _____ | _____ | _____ |
| 28. Are you or your spouse covered by a retirement plan or IRA?                                   | _____ | _____ | _____ | _____ |
| 29. Did you or your spouse pay into or intend to pay into an<br>IRA, Roth IRA or retirement plan? | _____ | _____ | _____ | _____ |
| 30. Did you receive distributions from a retirement plan/IRA?                                     | _____ | _____ | _____ | _____ |

**INVESTMENTS/BUSINESS**

- |  |       |       |       |       |
|--|-------|-------|-------|-------|
| 31. Did you sell any stocks, bonds, or real estate this year?  | _____ | _____ | _____ | _____ |
| 32. Have you been notified that any of your stocks are worthless?  | _____ | _____ | _____ | _____ |
| 33. Did you receive any income which is exempt from federal<br>taxes? (ex., municipal bond interest)   | _____ | _____ | _____ | _____ |
| 34. Did you pay a penalty on early withdrawal from a CD?   | _____ | _____ | _____ | _____ |
| 35. Are you invested in any registered tax shelters?   | _____ | _____ | _____ | _____ |
| 36. Did you actively participate in the operation of any<br>partnerships, S corporations, LLCs, or rental property for<br>which you are reporting an income or loss? | _____ | _____ | _____ | _____ |
| 37. Did you have any business bad debts?   | _____ | _____ | _____ | _____ |
| 38. Did you keep a mileage log on any vehicle you used for<br>your business or income producing property?  | _____ | _____ | _____ | _____ |

**(PLEASE PROCEED TO PAGE 3)**

