FINANCIAL ACCOUNTING SERVICES INC.

Tax Preparation and Financial Planning Questions

Client Name: ____________________ Tax Preparer: _____________________

How would you like to receive your tax return? Email Copy □ Paper/Pick-up □ Paper/Mailed ($15 fee) □

		Yes	No
1)	Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during this year?	☐	☐
2)	Are any of your unmarried children, who might be claimed as dependents, 19 years of age or older?	☐	☐
3)	Did anyone in your household have any tuition expenses?	☐	☐
4)	Did you have any childcare expenses?	☐	☐
5)	Did you make a contributions to or take any distributions from a retirement plan (401K, IRA, SEP, SIMPLE, etc.)?	☐	☐
6)	Do you have health insurance?	☐	☐
7)	Do you have health insurance through; Your employer ☐ Covered CA ☐ Other ☐	☐	☐
8)	Did you make any residential energy-efficient improvements or purchases?	☐	☐
9)	Did you purchase, sell or refinance a home?	☐	☐
10)	Do you anticipate applying for a loan in the next 12 months?	☐	☐
11)	Did you experience a short sale/foreclosure/loan modification on any properties in 2014?	☐	☐
12)	Did you incur moving expenses during the year due to a change of employment?	☐	☐
13)	Did you have any debts cancelled or forgiven?	☐	☐
14)	Did you have any bank accounts or other assets outside of the United States?	☐	☐
15)	Were you notified or audited by either the IRS or the State taxing agency?	☐	☐
16)	Would you like a financial review with your advisor?	☐	☐