|  |  |  |  |
| --- | --- | --- | --- |
| **Client Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |  |  |  |
| **ANNUAL QUESTIONS** | **YES** | **NO** | **DETAILS- Please Explain** |
| Receive any IRS or State notifications |  |  |  |
| Were you issued an Identity Protection Pin from IRS |  |  |  |
| Changes to Marital Status? |  |  |  |
| Change of Address |  |  |  |
| Legally Blind? |  |  |  |
| Active/Retired Military |  |  |  |
|   |  |  |  |
| Are you working with Financial Planner |  |  |  |
| Make Estimated Payments |  |  |  |
| Citizen/Financial Involvement Foreign Country |  |  |  |
| Receive, sell, exchange, dispose digiatl assets |  |  |  |
|   |  |  |  |
| Receive Unemployement- 1099G |  |  |  |
| Bankruptcy, Debt Cancellation, Foreclosure |  |  |  |
| Pay/Receive Alimony |  |  |  |
|   |  |  |  |
| Contribute Money to IRA, Traditional/Roth |  |  |  |
| Contribute to HSA, Family/Single, all Medical? |  |  |  |
| Market Place Health Insurance- 1095 A |  |  |  |
|   |  |  |  |
| Work As Educator with students K-12 |  |  |  |
| Own a business, interest in partnership or Corp |  |  |  |
| Operate a farm, or own Rental Properties |  |  |  |
|   |  |  |  |
| Buy/Sell Primary Home- 1099S |  |  |  |
| Participate in First Time Home Buyer Credit 2008 |  |  |  |
| Energy efficient improvements to primary home |  |  |  |
| Hire domestic services, nanny, housekeeper, cook |  |  |  |
| Pay mortgage interest, Real Estate Taxes- 1098 |  |  |  |
| Receive Income from Installment Sale |  |  |  |
| Purchase Energy efficient vehicle |  |  |  |
|   |  |  |  |
| Change in Dependency, adopt, birth, death |  |  |  |
| Children attend College, Year/Grade? Amount? |  |  |  |
| Children attend K-12 public, private, homeschool |  |  |  |
| Pay daycare |  |  |  |
| Out of Pocket Charity, Medical, Dental |  |  |   |
|   |   |   |  |
| ***Client Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** |  | ***Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** |
|  |  |  |  |
| ***Client Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** |  | ***Direct Depsosit Info\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** |