

Storhaug CPA

RETURNING CLIENT TAX INTERVIEW FORM

TAX YEAR _____

Driver's License Issue Date Expiration Date Number State

Taxpayer _____ _____ _____ _____

Spouse _____ _____ _____ _____

Can another taxpayer claim you as a dependent on their return? YES NO

If yes, did they? YES NO

Did you or your spouse become disabled or legally blind during the tax year? YES NO

If yes, Taxpayer or Spouse

Was your home in the United States for more than half of the tax year? YES NO

State of Residence _____ Did you live there the entire Year? YES NO

If no, list other states you resided in with dates _____

Did your marital status change in the tax year? YES NO

Do you have a new dependent or change who you will be claiming as a dependent? YES NO

New Dependent

Name Date of Birth Social Security # Relationship

Any dependent to be removed? Name _____

Do you have childcare expenses? YES NO

Please provide a statement from the childcare provider.

Do any of your dependents have income over \$2,200 from interest or dividends? YES NO

If yes, Dependent _____ Amount \$ _____

Did you pay alimony or spousal support? YES NO

If yes, Person Paid _____ Social Security # _____

Did you receive alimony? YES NO If yes, Amount \$ _____ Year Started _____

Do you have a flex plan? YES NO If yes, Amount \$ _____

Did you receive combat pay? YES NO If yes, Amount \$ _____

Do you have an HSA? YES NO If yes, have you used it? YES NO

If funds used, 1099-SA must be provided to our office.

Did you purchase your health insurance through the marketplace? YES NO

If yes, form 1095 A must be provided to our office.

Did you receive a form 1099 K? YES NO

Did you pay student loan interest? YES NO Amount \$ _____ **Provide statement**

Did you, your spouse, or dependent attend and pay for college? YES NO

If yes, Amount \$ _____ **Provide 1098-T & paid invoice from school.**

Do you contribute to a Retirement Plan, IRA, or Roth IRA outside of employer? YES NO

If yes, Type _____ Amount \$ _____

Did you receive, sell, send, exchange, or acquire any financial interest in any virtual currency?
(example: Bitcoin) YES NO

Did you receive a 1099K? YES NO (Do you sell items and get paid with a credit card or PayPal?)

Do you make federal or state estimated payments? YES NO

If Yes,

Federal Date _____ Amount \$ _____

Date _____ Amount \$ _____

Date _____ Amount \$ _____

Date _____ Amount \$ _____

State Date _____ Amount \$ _____

Date _____ Amount \$ _____

Date _____ Amount \$ _____

Date _____ Amount \$ _____

Do you have a foreign bank account valued at over \$10,000? YES NO

Did you transfer a home from parent to child? YES NO

Was your mortgage or credit card forgiven in foreclosure or restructure?

(i.e., Bankruptcy) YES NO

Were you notified via the IRS or State of any changes in a prior year's tax return? YES NO

If yes, bring in the notice.

Did you change your bank for direct deposit? YES NO

If yes, Bank Name _____ Checking _____ Savings _____

Routing # _____ Account # _____

Distribution preference for your completed return: **Pick one**

E-mail the signing documents to you.

Mail signing documents to you through the United States Postal Service.

You will stop by the office and sign your documents.

Distribution preference for your source documents: **Pick one**

E-mail

USPS

You will pick them up from our office