Tax Information Questionnaire – Please complete and return with your tax information

**Franklin P. Sparkman, Jr., CPA, PA**

**Certified Public Accountant**

Yes No

Did your marital status change during the year? ☐ ☐

If yes, nature of change: \_\_\_\_\_\_ Divorced \_\_\_\_\_\_ Married \_\_\_\_\_\_ Widowed

Did your address change from last year? ☐ ☐

Were there any changes in dependents from the prior year? ☐ ☐

If yes, explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you sell, exchange, or purchase any real estate during the year? ☐ ☐

If yes, please include a copy of the real estate closing statements.

Did you purchase gasoline or other fuels for off-highway use (e.g., farming)? ☐ ☐

Did you cash or surrender any Series EE or I U.S. Savings Bonds issued after 1989? ☐ ☐

If yes, did you use any of the proceeds to pay for higher education expenses? ☐ ☐

Have you made a withdrawal from a 529 plan or an IRA to pay for education expenses? ☐ ☐

Do you have evidence to substantiate charitable contributions of $250 or more? ☐ ☐

Are you a small business owner who has paid an unincorporated entity more than $600 for services or rent? ☐ ☐

NC or SC Sales and Use Tax – The state of North & South Carolina collects sales tax on any out-of-state purchases of consumer goods that have been obtained by mail order. If you are liable for this consumer use tax, please provide us with the amount of goods purchased during 2019.

Amount Purchased \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Tax Information Checklist**

**INCOME:**

* 1095-A
* W-2’s
* 1099-INT, Interest Statements
* 1099-DIV, Dividend Statements
* 1099-R, Retirement account distributions
* 1099-SSA, Social Security income
* 1099-G, State and Local tax refunds
* 1099-MISC, Miscellaneous income/Gambling (W2-G)
* 1099-B, Brokerage statements, Include cost basis information on any sale of investments
* Unemployment compensation
* Alimony received
* K-1’s from Partnerships, S Corporations, Trusts
* Other Sales of Investments
* Rental, Self Employed, Farm Income
  + Income – summarized by category
  + Expenses – summarized by category
  + Auto mileage and expenses (business portion)
  + List of equipment, furnishings, etc. purchased during the year
  + Detail on assets sold during year

**EARNED INCOME CREDIT DEPENDENTS AND HEAD OF HOUSEHOLD FILING STATUS:**

* In order to combat tax fraud, the IRS is now requiring that paid tax preparers retain written proof that dependents reside with the taxpayer(s) claiming the earned income credit. Acceptable proof includes a birth certificate, school records, insurance records, childcare records, or medical records.

**ADJUSTMENTS TO INCOME:**

* Un- reimbursed job expenses for teachers (grades K-12) ($250 Max) Amount ($) \_\_\_\_\_\_\_\_\_\_\_\_
* Regular IRA or SEP contributions. Amount Contributed:

Taxpayer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Self-employed health insurance Amount paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Alimony Paid:

Recipient’s name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Social Security Number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Amount Paid\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Student loan interest. Bring Form 1098-E

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* Tuition expenses for taxpayers of dependents. **Form 1098-T must be provided** in order to claim education credits. \_\_\_\_\_\_\_\_\_\_\_\_\_

**DEDUCTIONS:**

**Medical:**

* Health insurance premiums paid with after tax dollars. (DO NOT include Medicare premiums which we obtain from form 1099-SSA) Amount Paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Long-term care insurance premium payments

Taxpayer \_\_\_\_\_\_\_\_\_\_\_\_ Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Medical expenses (out of pocket)

Prescriptions \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Doctors and Dentists \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Medical \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Medical Mileage \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Taxes:**

* County/City Taxes. Amount Paid

Real Estate \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Automobiles\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(This tax is paid with the renewal of your tag)

* Sales Tax Deduction: (Motor Vehicle, Boat, Home or Home Building Supplies)

Amount Paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mortgage Interest on Home Acquisition Debt:**

* Home equity line interests for proceeds used to buy, build or improve your home ONLY
* Home mortgage interest, points and mortgage insurance premiums. Include all 1098 Forms.

**Contributions:**

* **Charitable Contributions** – provide only those that are documented with a canceled check or receipt. For a gift of more than $250 at one time, written acknowledgment from the charity must be obtained.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* For a contribution of items in which you wish to claim more than $500, please provide a receipt from the charity which documents the value. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Childcare Credit:**

* Child Care Expenses Paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provider’s name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provider’s address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provider’s tax ID number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_