

# GENERAL INFORMATION

Office Use Only:

CLIENT # \_\_\_\_\_ PARTNER'S NAME \_\_\_\_\_

NAME: \_\_\_\_\_  
(last) (first) (middle)

SPOUSE'S  
NAME: \_\_\_\_\_  
(last) (first) (middle)

RESIDENTIAL  
ADDRESS: \_\_\_\_\_ APT# \_\_\_\_\_

CITY &  
STATE: \_\_\_\_\_ ZIP \_\_\_\_\_

HOME PHONE#: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

## TAXPAYER

## SPOUSE

OFFICE  
PHONE#: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

OFFICE  
PHONE#: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

S.S. # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

S.S. # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

BIRTHDATE: \_\_\_\_\_

BIRTHDATE: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

	<u>DEPENDENT'S NAME</u>	<u>DATE OF BIRTH</u>	<u>S.S. #</u>	<u>RELATIONSHIP</u>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____

HOW WERE YOU REFERRED TO OUR COMPANY? \_\_\_\_\_

**PLEASE MARK ONLY THE FOLLOWING QUESTIONS THAT APPLY TO YOU.  
CHANGES TO TAX LAWS ARE IN BOLD.**

**SOURCES OF INCOME:**

- A. Do you have all W-2's from places you were employed? \_\_\_\_\_  
1. Unemployment Compensation? Sick Pay? \_\_\_\_\_  
2. Military Combat Pay? \_\_\_\_\_
- B. Do you have a statement, for each account, in which you have received interest? \_\_\_\_\_  
1. Did you cash in U.S. Savings Bonds? What was it used for? \_\_\_\_\_  
2. Interest received from insurance policies? \_\_\_\_\_  
3. Do you receive any tax-free interest income? \_\_\_\_\_
- C. Do you have a statement for each account in which you, have received dividends? \_\_\_\_\_
- D. Retired? Bring all 1099's from pension and social security benefits. \_\_\_\_\_
- E. Sale of stock? Bring your records of both purchase and sale. Twelve-month holding period for long term gains. **Cost basis reporting, please provide full documentation.** \_\_\_\_\_
- F. Have you taken a distribution from any retirement account? \_\_\_\_\_  
Over 70 ½? Ask about minimum IRA distributions.  
Educational and First Home Buying cost are excludable. \_\_\_\_\_
- G. Income from miscellaneous source. \_\_\_\_\_  
1. Alimony? \_\_\_\_\_  
2. Commissions? \_\_\_\_\_  
3. Lump sum distribution from pension/profit sharing/savings and investment plan? \_\_\_\_\_  
4. Did you receive any other monies? \_\_\_\_\_
- H. Have you had any debt cancelled? **Foreclosure? Short Sale?** \_\_\_\_\_
- I. Rollover IRA to Roth IRA? \_\_\_\_\_
- J. Did you review your statement of earnings from Social Security? \_\_\_\_\_  
You can go online and review. \_\_\_\_\_

**ADJUSTMENTS TO INCOME:**

A. Are you divorced? Do you make alimony or separation payment? \_\_\_\_\_  
Bring divorce papers with you. Recipient's last name and social security number.

Name \_\_\_\_\_ S.S. # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

B. Cashed in a certificate of deposit early? \_\_\_\_\_

C. Are you or your spouse covered by a retirement plan at work?  
If so, what kind? \_\_\_\_\_

D. Individual retirement account? **Limits-\$5,500 under 50 and \$6,500 over 50 (IRA)\*** Deposit must be made by **April 15, 2019.** \_\_\_\_\_

If so, how much went into each account:

Husband \_\_\_\_\_

Wife \_\_\_\_\_

E. If you are unable to deduct your IRA contribution, would you still like to contribute to a Roth IRA? \_\_\_\_\_

F. Did you or your employer establish a Health Savings Account?  
Please provide statements \_\_\_\_\_

G. Educational IRA for your children. \_\_\_\_\_

H. Education Expenses Deduction (keep receipts) \_\_\_\_\_

I. Deduction for Army Reserve, Performing Artist and Legal Fee's for discrimination law suits. \_\_\_\_\_

J. Moving Expenses? **Applies to Military Only!!!** \_\_\_\_\_

**DEDUCTIONS FROM INCOME:**

A. Did you have any medical expenses? Were you reimbursed for the expenses? Long term care expenses? Long term care insurance? Home improvements for medical reasons? **Medical Mileage is 18 cents in 2018. 65 or older? Have you registered for Medicare?** \_\_\_\_\_  
**1. FORMS 1095 Were you on an exchange?**

B. Make any estimated tax payments and/or prior year tax payments to the Federal, State or City governments? Bring cancelled checks. \_\_\_\_\_

C. Any interest expense? \_\_\_\_\_  
1. In the event you have not received a statement, call and get information, and ask for a statement to be mailed! \_\_\_\_\_

- 2. Student Loan Interest, loans could be in student's name to avoid income limitations. \_\_\_\_\_
- 3. Interest related to investments (Margin interest). \_\_\_\_\_

D. Any charitable contributions? \_\_\_\_\_

- 1. **All contributions must be documented.** \_\_\_\_\_
- 2. Cash contributions? (List of who & amount) \_\_\_\_\_
- 3. Non-cash contributions? (Need valuation receipt, inventory, pictures) \_\_\_\_\_
- 4. Did you incur any charitable travel expenses? Volunteer expenses? Charitable mileage rate is 14 cents in 2018. \_\_\_\_\_
- 5. State political contribution. \_\_\_\_\_
- 6. **Consider donating appreciated stock.** \_\_\_\_\_

E. Did you have casualty loss? **Must be a Federal declared disaster.** \_\_\_\_\_

**OTHER INFORMATION:**

A. Did your marital status change during 2018? \_\_\_\_\_

B. Any new additions to the family? \_\_\_\_\_

- 1. Any dependents claimed in prior year which are not dependents this year? \_\_\_\_\_
- 2. Do you have a child in college or did you return to school? \_\_\_\_\_
- 3. Planning a college education? Ask about prepaid tuition plans, scholarships, 529's to help with tuition cost. Computers are qualified expense for 529 distributions. \_\_\_\_\_
- 4. Do you provide support for anyone who you may be claimed as a dependent? Please go over **all** members of your household. \_\_\_\_\_
- 5. Are you being claimed as a dependent by another person? \_\_\_\_\_

C. Are you 65 or over? \_\_\_\_\_

- 1. Are you disabled or blind? \_\_\_\_\_
- 2. If 65 or over, or disabled, you may qualify for Homestead Exemption or reduced utility bills. \_\_\_\_\_

D. Did you sell, buy or finance a home in the last three years? \_\_\_\_\_

- 1. Bring all related escrow settlement statements and improvements. \_\_\_\_\_

E. Do you have income from partnership or any other business venture? (Whether profitable or not) Bring K-1's or let us know if they are coming. \_\_\_\_\_

F. Self employed? Own your own business? \_\_\_\_\_

- 1. Cancelled check and bank statements for December 2017 to January 2019. Both personal and business must be presented! (All 14 months) \_\_\_\_\_
- 2. Sell a car/truck or business equipment? If so, names, dates, cost, sales price and all paperwork. \_\_\_\_\_

- 3. To be able to deduct auto expenses, you must maintain a log book on a daily basis. \_\_\_\_\_
- 4. Did you buy any business property in 2018? \_\_\_\_\_
- 5. Do you have a Keogh Account or SEP? Do you need one? \_\_\_\_\_
- 6. Do you have an office in your home? Need sq. ft. \_\_\_\_\_
- 7. Did you pay for health insurance premiums for yourself, your spouse and your dependents? Employee Health Care Credit \_\_\_\_\_
- 8. Were you eligible to participate in any subsidized health plan maintained by your spouse's employer? \_\_\_\_\_
- 9. Did you go on vacation? If so, was it connected with your business or profession in any way? \_\_\_\_\_

G. Are you properly income-splitting with your children through business, savings accounts, etc.? \_\_\_\_\_

H. Have you received tax notices from any of the tax agencies during 2018? If so, let us review them. \_\_\_\_\_

I. Do you own rental property? (Bring all related paperwork) \_\_\_\_\_

J. Have you been audited in the last three years? \_\_\_\_\_

K. Do you have copies of your prior returns? (2015-2017) \_\_\_\_\_

L. Do your children have savings accounts or any other type of interest-bearing investments? If so, bring in their 1099 statement and expenses paid to maintain these accounts. \_\_\_\_\_

M. Do your children have any earned income? If so, bring in their W-2's or 1099 statements. Did you open their Roth IRA? \_\_\_\_\_

N. Did you incur child care expenses so you and your spouse could work? If so, bring in cancelled checks and list the following information for who you paid: \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

S.S.# or \_\_\_\_\_

I.D.# \_\_\_\_\_

**\*Note: Without the above information, the credit will not be allowed.**

O. Did your employer provide dependent care benefits? (DCB)? \_\_\_\_\_

P. Adoption Expenses? \_\_\_\_\_

Q. Do you employ anyone in your home? \_\_\_\_\_

## **ANYTHING ELSE YOU FEEL IS A DEDUCTION?**

If so, please bring receipts and documentation. \_\_\_\_\_

**\*REMINDER: ALL DEDUCTIONS MUST BE SUBSTANTIATED WITH RECEIPTS AND/OR OTHER DOCUMENTATION.**

**\*\*INCOME TAX FEES MUST BE PAID BEFORE COMPLETED RETURNS WILL BE RELEASED. WE WILL INFORM YOU OF THE TAX PREPARATION FEE BEFORE YOU COME IN TO PICK UP YOUR RETURNS.**

**\*\*\*AS IN PAST YEARS, WE HAVE TRIED TO KEEP ALL OF OUR CLIENTS INFORMED OF THE EVER CHANGING TAX LAWS. THIS IS A SUMMARY OF SOME OF THE LAW CHANGES FOR 2018**

1. **Business Mileage rate for 2019 is 58 cents per mile.**

**Please consult with your tax advisor regarding how these matters can impact you.**

### **\*\*\*\*2019 TAX SEASON POINTS OF INTEREST**

1. **With the new tax law some may not itemize deductions. We are asking you to continue to bring all information so we can properly advise you on possible tax saving strategies.**
2. **Culkar, Stachowicz & Co. can provide a convenient means for clients to access their completed 1040 tax returns 24/7 via our website portal. This portal is PASSWORD PROTECTED and SECURE.**
3. **We are also accepting VISA/MASTERCARD, DISCOVER & AMERICAN EXPRESS as payment options.**

**It is more important than ever to consider a tax planning appointment during the year (May – December). We at Culkar, Stachowicz & Co. want to provide the best service possible. To successfully do that, planning during the year is essential.**

**Thank you for your trust.**

**Culkar, Stachowicz & Co. CPA's**