

2015	1040	US	Miscellaneous Questions
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If any of the following items *pertain to you, your spouse or dependents for 2015*, please circle the appropriate response and provide additional information if necessary.

PERSONAL & DEPENDENT INFORMATION

Y N Did your *marital or filing status change* during the year?

Y N Did your *address change* during the year?

Y N Were there any *changes in dependents*?

Y N Did you pay any *child or dependent care expenses*?

HEALTH CARE COVERAGE

Y N Did you and your dependents have **health care coverage** for the full-year?

Y N Did you receive any Forms 1095-A, B or C? Please provide.

Y N If you or your dependents did not have health care coverage during the year do you fall into one of the exemption categories? Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship. Please attach an exemption certificate.

INCOME

Y N Did you, your spouse or any dependents receive an *Alaska Permanent Fund Dividend*?

Y N Did you receive *tip income*?

Y N Did you receive any *Forms 1099-K or 1099-MISC*?

Y N Did you *cash* any Series EE U.S. *savings bonds*?

Y N Did you receive any *disability income*?

Y N Did you have any *foreign income*, pay any *foreign taxes*, or have any *interest in or authority over an account, trust or property* in a *foreign country* (including Canada or Mexico)?

PURCHASES, SALES AND DEBT

Y N Did you start or have an interest in a *business, farm, rental, royalty, partnership, S corporation, trust, LLC, or REMIC*?

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Y N Did you ***purchase or dispose*** of any ***business assets*** (equipment, real estate, etc.) or ***convert*** any personal assets to business use?

Y N Did you ***buy or sell*** any stocks, bonds or other ***investment*** property?

Y N Did you ***purchase, sell, or refinance*** your principal ***home, second home***, or ***rental***, including ***boats and RV's***, or take a ***home equity loan***?

Y N Did you have any ***credit cards or debt canceled*** or forgiven?

Y N Did anyone ***owe you money*** which became noncollectable?

RETIREMENT PLANS

Y N Did you receive a ***distribution*** from or make a ***contribution*** to a ***retirement plan***? 401(k), IRA, ROTH, SEP, SIMPLE, Qualified Plan, etc. Circle which

Y N Did you ***transfer, convert, re-characterize or rollover*** any retirement accounts?

EDUCATION

Y N Did you receive a ***distribution*** from an Education Savings Account (***Coverdell***) or a Qualified Tuition Program (***529 Plan***)?

Y N Did you, your spouse, or a dependent incur any ***tuition, fees or books*** expenses?

Y N Did you or your spouse incur any ***expenses*** working as a ***teacher, counselor***, or ***principal*** for classes taught in grades K-12?

Y N Do you have any ***student loans***?

ITEMIZED DEDUCTIONS

Y N Did you ***renew*** state registration or ***purchase*** any motor vehicles, trailers, or boats?

Y N Any ***large purchases*** that were ***subject to a sales tax***?

Y N Did you incur a loss because of ***damaged*** or ***stolen property***?

Y N Did you ***work out of town*** for part of the year?

Y N Any business, medical, moving or charitable ***mileage to claim***?

Y N Do you have ***charitable contributions*** to claim?

MISCELLANEOUS

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- Y N Did you transfer or was a **home transferred** from **parent to child**?
- Y N Do you have any **household employees**?
- Y N May the **IRS discuss** this return **with the preparer**?
- Y N Did you have any **energy efficient improvements** (solar, wind, geothermal, or fuel cell) to your home?
- Y N Was your **home rented** out or **used for business**, including a home office?
- Y N Do you have a **health savings account** (HSA), **medical savings account** (MSA), **long-term care** (LTC) contract, or **COBRA** policy?
- Y N Did you incur **moving** expenses due to a change of employment?
- Y N Were you **notified or audited** by either the Internal Revenue Service or the State taxing agency?
- Y N Did you or your spouse make any **gifts** to an individual that total more than \$14,000, or any gifts to a trust?
- Y N Did you make any **estimated tax payments** or **apply an overpayment** of 2014 taxes to your 2015 estimated tax?
- Y N Did your bank account information change within the last twelve months?
- Y N May we **email** you to request information? Please provide your current email address

The information and responses entered on these Miscellaneous Questions, and also if attached, the Client Information and Organizer, are accurate and true to the best of my knowledge.

Sign & Date _____

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Privacy Disclosure Policy:

The Gramm-Leach-Bliley Act requires that we notify you annually of our disclosure policy regarding the release of any personal information we obtain from you.

Your personal information will never be sold or given to any business or individual, and is used only as permitted by law. Any release of your personal information to a third party will require your previous written consent or verification. This is to protect your privacy. All employees are trained in the proper handling of private information, and have agreed to abide by Webster Tax Service policies. If you have any questions regarding this policy please contact us.