

## Questionnaire 2016

## Students and Other Dependents

Please check the appropriate box and include all necessary details  
When in doubt, please "Not Sure" so that we can discuss the issue with you.

Name: \_\_\_\_\_ Spouse's Name \_\_\_\_\_

## Contact Information

E-mail address(es): \_\_\_\_\_ or  I don't use e-mail

Best phone number to reach you \_\_\_\_\_

How do you prefer to be contacted?  e-mail  Phone

How would you prefer to receive your copy of your return?  paper copy  PDF through Portal

## Personal Information

Did you marry, divorce, separate or become a widow to death during the year?  Yes  No  Not Sure

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

Do you want us to use your parents' address on your return?  Yes  No  Not Sure

Did your address change from last year?  Yes  No  Not Sure

New Address: \_\_\_\_\_ Date Moved: \_\_\_\_\_

Do you want any refund to get directly deposited to your bank?  Yes  No  Not Sure

If yes, Bank Name \_\_\_\_\_ Account # \_\_\_\_\_

Is it a  checking or  savings account? (if not a local bank, please attach voided check)

Do you have any children who live with you?  Yes  No  Not Sure

## Purchases, Sales and Debt Information

Did you **buy or sell stock** during the year (other than in a retirement acct)?  Yes  No  Not Sure

Did you have any debts, such as credit card bills, forgiven or settled for less?  Yes  No  Not Sure

Did you pay any **student loan** interest this year? (We need the 1098-E)  Yes  No  Not Sure

## Income Information

Please make sure we have all W-2s and 1099s issued to you.

Do you have any income from hobbies or odd jobs?  Yes  No  Not Sure

Please check yes or ??? if you:

Sell produce or farm products, sell items through home parties, get paid to teach classes or monitor tests or sell on-line (other than personal items at no profit.)

Describe briefly: \_\_\_\_\_

Do you receive payment for any work you did that you **don't have** a W-2 or 1099 for?  Yes  No  Not Sure

Did you win any **prizes** (not just **money**) from bingo, raffles or gambling?  Yes  No  Not Sure

Did you have any foreign income or pay any foreign taxes during the year?  Yes  No  Not Sure

Did you withdraw money from an IRA, Keogh, SIMPLE, or SEP account?  Yes  No  Not Sure

Did you withdraw money from an education savings (529) plan? We need 1099Q  Yes  No  Not Sure

Did you receive **tip income not reported to your employer** this year?  Yes  No  Not Sure

Did you cash any U.S. Savings bonds?  Yes  No  Not Sure

**Miscellaneous Information**

Did you, attend college during the year?  Yes  No  Not Sure  
If yes, please get a copy of the **1098-T** and a **statement** of your account from the college.  
You can usually get this information on line. Give this to your parent or other person who  
claims you as a dependent.

Do you have a felony drug conviction?  Yes  No  Not Sure  
Have you been the victim of **identity theft**?  Yes  No  Not Sure  
(not just notification of a data breach)

Have you ever lived in or do you have any connection with any **foreign countries**  
including Canada?  Yes  No  Not Sure

Did you receive correspondence from a state tax department or the IRS ?  Yes  No  Not Sure  
If yes, please give us a copy or explain: \_\_\_\_\_

Did you contribute to an IRA (other than through your employer)?  Yes  No  Not Sure  
Would you like to discuss contributing to an IRA before April 15 to save taxes?  Yes  No  Not Sure

Did you make purchases **out of state, by mail order, telephone or internet** of items that would have been subject  
to sales tax if purchased in your resident state and NOT pay sales tax at the time of purchase? **If you shop at Walmart in  
Hinsdale or on Amazon, check "yes."** Yes  No  Not Sure   
Use "safe harbor" amount  or actual amount spent \$ \_\_\_\_\_  
(The "safe harbor" amount based on your income has gone up. If you prefer to keep actual track of your non-taxed purchases you may)

Would you like to meet or talk with your preparer to go over your return?  Yes  No  Not Sure

Do you have any questions or concerns?

**Vermont and Massachusetts now require us to get a copy of your CURRENT driver's license and provide the numbers when electronically filing your return.**



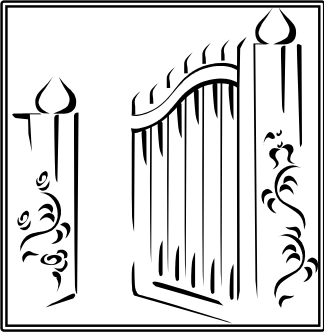
**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_



**Please note:** If you are 18 years of age or older, we cannot give your parents any information about your return unless you authorize us to do so in writing.

If you need us to give your return or other information to your parents, please sign the Release/Authorization attached or available on our website: [www.vermonttaxservices.com](http://www.vermonttaxservices.com)

You may withdraw that authorization at any time by notifying us.



# Business & Tax Consultants, Inc.

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## Release/Authorization

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid.

If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Duration of consent (optional):  6 Months     1 Year     5 Years     Other \_\_\_\_\_  
(expires after a year unless you enter something else)

I, \_\_\_\_\_ authorize Business & Tax Consultants, Inc. to  
Your Name

### Purpose of Release: (check box and complete as necessary)

- 1. Allow my parents to pick up my tax materials.
- 2. Allow \_\_\_\_\_ to pick up my tax materials.  
Other person's name
- 3. Give \_\_\_\_\_ my tax return.
- 4. Other \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

If completing on line, please type your name