

Questionnaire

Please check the appropriate box and include all necessary details.

Name: _____ Your e-mail address if you use one _____

Phone Number(s) _____

Personal Information

- Did you marry, divorce, separate or become widowed during the year? Yes No Not Sure
- Did your address change from last year? Yes No Not Sure
- New Address: _____ Date Moved: _____
- Did you or your spouse become blind or disabled during the year? Yes No Not Sure
- Is someone else supporting you—paying most of your bills? Yes No Not Sure
- Do you want to **change** the bank account where your refund is deposited? 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)

Purchases, Sales and Debt Information

- Did you **buy or sell, any real estate** during the year? Yes No Not Sure
- Did you **sell stock** during the year (other than in a retirement acct)? Yes No Not Sure
- Did you **take out a home equity** or refinance your mortgage this year? Yes No Not Sure
- Did you **sell a business, rental, or other property** this year? Yes No Not Sure

Income Information

- Do you have any income from hobbies or odd jobs? Yes No Not Sure
- Please check "Yes" or "Not Sure" if you:
Sell produce or farm products (and you are not a farmer), 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: _____
- Did you win any prizes or money from bingo, lotteries, raffles or gambling? Yes No Not Sure
- Do you get paid for any work you did that you don't have a W-2 or 1099 for? Yes No Not Sure
- Did you have any foreign income or pay any foreign taxes during the year? Yes No Not Sure
- Did you receive any income from property sold prior to this year? Yes No Not Sure
- Did you receive Social Security Benefits? Yes No Not Sure
- If not, will you start this year? Yes No Not Sure
- Did you receive any payments from a pension or IRA? Yes No Not Sure
- Did you cash in any life insurance policies? Yes No Not Sure
- Did you cash any U.S. Savings bonds? Yes No Not Sure
- Do you rent out a home or RV through Airbnb or other such agencies? Yes No Not Sure

Miscellaneous Information

- Did you receive or pay **Alimony**? If yes, amount: \$ _____ Yes No Not Sure
- Did you give anyone more than \$14,000 (cash, real estate or other)? Yes No Not Sure
- Did you make any contributions to an education savings or 529 Plan? Yes No Not Sure
- Did you pay long-term (nursing) health care insurance premiums? Yes No Not Sure
- Did you make energy efficient improvements to your home this year? Yes No Not Sure

Have you ever lived or worked in, or were you born in, or do you have any connection with any **foreign countries** (including Canada) such as bank accounts, real estate owned, relatives or close friends living abroad, or any interest in a foreign bank account, corporation or partnership? Yes No Not Sure

***If “No” initial here: _____

If you answered “Yes” or “Not Sure” please ask for the foreign interest questions.

Obamacare/Affordable Care Act

Did every person in your household* have medical insurance **
for all of 2015? Yes No Not Sure

If you have medical insurance, you should get a 1095A, B or C. Please bring it or send it to us.


If you didn't get a 1095 but all members of your household were insured by Medicare, Medicaid, VA or an employer, please sign here _____


If some or all of your household members did not have insurance, please let us know who and why.

*Household for this purpose includes your spouse, children you claim as dependents, children (up to age 24) who live with you, **and** your unmarried partner if you claim him/her as a dependent or they are the parent of your dependent child. ** **Insurance includes Medicare & Medicaid & VA coverage.**

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

New Hampshire Residents Only: You are done!!!! Sign here.

 **Signature** _____

Date _____ 

Vermont and Massachusetts residents keep going. You have one more page!

Vermont Residents Only:

Do you RENT or OWN your home? RENT (bring a Landlord Certificate) OWN (bring your property tax bill) NEITHER/NO
(If you know you don't want property tax help, check NEITHER/NO. If NEITHER/NO go to → USE TAX below.)

Do **you or any household members** receive or pay child support? Yes No Not Sure

Did **you or any household members** receive any of the following: (check any that might apply) or NONE

- Veterans Benefits Military allowance Hobby income
- Workers Compensation Welfare (not including food stamps or fuel assistance)
- Gifts over \$6500 Lottery or other prize (of any amount)

List all members of your household other than your spouse or dependent children:

_____ Did any of your dependent children **earn** (from a job) more than \$6,500? Yes No Not Sure

_____ Did any of your dependent children have **unearned income** (social security, bank interest) of **any amount**? Yes No Not Sure

If yes, list amounts or include statements _____

→ **USE TAX:** 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?

Yes No Not Sure Use "safe harbor" amount or, I owe use tax on \$ _____

(The "safe harbor" amount is based on your income. If you prefer to keep track of your non-taxed purchases you may. We can give you more information about this or you can check here <http://tax.vermont.gov/individuals/income-tax-returns/use-tax> for more information.)

If you shop at Walmart in Hinsdale or on Amazon for anything other than clothes and food, you owe use tax.

Would you like to contribute to any of the following (to be deducted from your refund or added tax due)?

Green Up Vermont \$ _____ Children's Trust Fund \$ _____ Nongame Wildlife Fund \$ _____ Vermont Veterans Fund \$ _____



Signature _____ **Date** _____



Vermont residents are done!

Massachusetts Residents Only:

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 check "yes."** Amazon collects MA sales tax.

Yes No Not Sure Use standard amount or actual amount \$ _____

(The "standard" amount based on your income has gone up. If you prefer to keep actual track of your non-taxed purchases you may)

1. If you don't own your home, what is the total rent you paid during the year \$ _____
Name and address of landlord: _____

2. Would you like to contribute to any of the following: (to be deducted from your refund or added tax due)
Organ Transplant Fund \$ _____ AIDS Fund \$ _____
Endangered Wildlife Fund \$ _____ US Olympic Fund \$ _____
Military Family Relief Fund \$ _____ Homeless Animal Care \$ _____



Signature _____

Date _____

