

Adams, Moore, and Adams, LLC. Individual Income Tax Questionnaire

Please provide the following information to ensure your return is prepared correctly and avoid costly penalties, interest, and amending of returns. If you are a new client, please provide a copy of last year's tax return including depreciation schedules. Thank you for helping us prepare a correct return.

Taxpayer: _____

Spouse: _____

Address: _____

Phone: _____ Email: _____

Today's date: _____

New Clients	
DOB _____	SSN _____
DOB _____	SSN _____

Please carefully read the following and check all that apply to your return. Supply additional information on back. **If you have new dependents please provide names, birthdates, and SSNs.**

Tax information

Marital status change	Change in dependents	Dependent who doesn't live with you
Traditional IRA contributions	Roth IRA contributions	HSA contributions (5498-SA)
HSA withdrawals(1099-SA)	College tuition (provide 1098T)	Moved during the year
Self-employment income	For-profit farm	Rental property income/loss
Social Security benefits	Retirement/IRA income	Inherited property
Bought/sold rental property	Bought/sold business property	Paid estimates (not withholding)
Had online gambling account	Had foreign bank acct	Owned cryptocurrency
Bought/sold real estate	Paid for dependent care	Bought electric car
Have corporation or LLC	Healthcare.gov Insurance (1095-A)	Energy efficient home improvements
Had qualified overtime	Had qualified tips	Had vehicle loan interest

Tax preparation preferences

Bank account changed	Direct deposit any refunds	Direct pay amounts due
Mail my return	I'll pick up my return	Send my return electronically

Please provide a copy of taxpayer and spouse driver's licenses so we may e-file your Ohio return!

I certify that the information provided above is true to the best of my knowledge.

Signed _____ Date _____

Additional Information and Questions