

# WYZE Tax & Accounting Services INC



## Tax Questionnaire

PLEASE ANSWER THE FOLLOWING QUESTIONS  
(attach additional information or a detailed explanation of all questions answered "yes")

<b>TAXPAYER NAME:</b>			
Were you (or spouse) notified by the IRS or the State Department of Revenue of any changes to		YES	NO
Are any of your claimed dependents not residents or U.S. Citizens?		YES	NO
Did you (or spouse) make any gifts of more than \$15,000.00 to any individual?		YES	NO
Do you (or your spouse) have any foreign income or foreign bank accounts?		YES	NO
Do you (or your spouse) have any worthless stock or any uncollectable bad debts?		YES	NO
Are you (or spouse) a handicapped employee?		YES	NO
Did you (or spouse) receive any distributions from IRA's, Profit Sharing or Pensions		YES	NO
Do you (or spouse) expect any changes in income, deductions, withholding or tax liability next		YES	NO
Did you (or spouse) sell, exchange or transfer any assets, stock, mutual funds, real estate etc		YES	NO
DID YOU RECEIVE, SELL, SEND, EXCHANGE, OR OTHERWISE ACQUIRE ANY FINANCIAL INTEREST IN ANY VIRTUAL CURRENCY?		YES	NO
Did you (or spouse) have any living expenses in a foreign country as a result of income earned		YES	NO
Did you (or spouse) have any winnings from lotteries, casino's, racetrack or other gambling		YES	NO
Have you (or spouse) used bartering or a similar activity to exchange any goods/services?		YES	NO
Did you (or spouse) receive any reimbursement from medical, casualty or theft loss deductions?		YES	NO
Have you (or spouse) had any business activity or planning to do so next year?		YES	NO
Do you (or spouse) have children under 24 with interest, dividend, investment income?		YES	NO
Did you (or spouse) pay anyone (over 18) \$2,00.00 or more to work in your home?		YES	NO
Did you (or spouse) donate any goods or assets to charitable organizations?		YES	NO
Will you (or spouse) reach age 72 this year or will do so next year?		YES	NO
Did you (or spouse) receive any employer provided educational assistance this year?		YES	NO
Did you (or spouse) pay or receive any long term care insurance premiums/benefit?		YES	NO
Are you (or spouse) making payments for a student loan?		YES	NO
Do you (or your spouse) have any dependents planning to or in college-certification?		YES	NO
Are you (or spouse) planning or attending college or other post secondary school?		YES	NO
Did you (or spouse) purchase a Hybrid/Electric vehicle this year?		YES	NO
Did you (or your spouse) have any energy credit related expenses for your personal home?		YES	NO
Did you (or spouse) have any renewable energy expenses for any of your homes?		YES	NO
Did you (or your spouse or your children have health insurance coverage for the full year?		YES	NO
Did you (or spouse or your children participate in "Healthcare.gov"? (MARKETPLACE)		YES	NO
Did you (or spouse) receive any income from sources not reported to the IRS?		YES	NO
Do you (or spouse) have any questions relative to other income or expenses?		YES	NO
Do you (or spouse) have any questions relative to other income or expenses?		YES	NO
Do you (or spouse) have plans to retire within the next 7 years?		YES	NO
Would you (or spouse) like a free retirement planning consultation?		YES	NO
Use this space to list other questions or further explanations to any questions answered yes above			