

Please answer all that apply to the current tax year.

TAX YEAR 2018

TAXPAYER & SPOUSE NAME _____

BEST CONTACT PHONE NUMBER _____

EMAIL ADDRESS _____

1. If any of the following have changed since we last prepared a return for you, please fill out an Information Change Form:

Address	New Dependent	Remove Dependent
Marital Status	Death of a Spouse or Dependent	

2. Do you or your spouse, if applicable, have signing authority on a foreign bank account, or did you receive a distribution from, or were grantor of, or transferor to, a foreign trust?

Yes No

3. Are you or your spouse, if applicable, required to repay a 2008 First Time Home Buyers Credit?

Yes No

4. Did you, your spouse, and any dependents have health insurance for all 12 months of 2018?

Yes No

If the answer is "No", please provide 1095's you received, if any.

5. Did you, your spouse, or any dependents receive health insurance through a federal or state exchange in 2017?

Yes No

If the answer is "Yes", we will need your Form 1095-A before we can complete your return.

6. If you are due an income tax refund and would like the amount direct deposited to your bank account, please enter the following information:

Routing Number _____ Bank Name _____
Account Number _____ Checking Savings

7. If you can claim mileage for a business, rental, farm, or partnership, please use our business expense worksheet. **NOTE: Unreimbursed Employee Expenses are no longer deductible.**

8. Answer the following only if you had a business, rental property, or farm:

a. Did you make any payment in 2018 that would require you to file Form(s) 1099? Y N

b. If "Yes", did you or will you file the required Forms 1099? Y N

For more information about 1099 filing requirements and penalties, visit www.mefcpas.com.

9. Other items to discuss: _____

Please present your driver's license or state ID to the receptionist.