Please answer all that apply to the current tax year. **TAX YEAR 2019**

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, or any dependents receive health insurance through a federal or state exchange in 2019?

   ☐ ***Yes*** ☐ ***No***

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

5. During 2019, did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (Bitcoin, for example)?

   ☐ ***Yes*** ☐ ***No***

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 2019 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.