

** TAXPAYER (TP) NAME (& spouse SP):

PLEASE PROVIDE ALL OFFICIAL TAX FORMS YOU MAY RECEIVE AND AMOUNTS. BE COMPLETE, YOU ARE RESPONSIBLE FOR THE INFORMATION BEING REPORTED ON YOUR RETURN.

Please clearly indicate if there were any CHANGES FROM PRIOR YEAR to the following and also describe all CURRENT YEAR ITEMS in the checkboxes below:

ADDRESS OCCUPATION TP: SP: HOME PHONE WORK PHONE TP: CELL PHONE TP EMAIL ADDRESS TP: SP: CELL PHONE SP

WE WILL EFILE YOUR RETURNS AND WILL BE LISTED AS A THIRD PARTY DESIGNEE AND PAID PREPARER. ANY CONFLICTING INFO PROVIDED WILL NEED TO BE DISCUSSED.

How would you like us to deliver your completed return to you? Portal/Fax/Electronic USPS Regular Mail (add'l \$5) Client will Pick-Up

* If you are due a REFUND, how do you want to receive it? DIRECT DEPOSIT or MAILED to you? Would you like RFD: SPLIT between accounts | Purchase US SVG BOND or, If you OWE, how do you want to pay? DIRECT WITHDRAWAL or MAIL A CHECK? You will choose a withdrawal date when you sign.

* DIRECT DEPOSIT - IS YOUR BANKING INFORMATION STILL THE SAME? NEW |SVG / CKG | ROUTING# ACCT#

* Would you like to donate to the presidential election fund (\$3) YOU? SPOUSE? NO

* Amount you would like to donate to the MN Nongame Wildlife - YOU? YOUR SPOUSE? NO

* You elect NOT to purchase Protection Plus Audit Insurance, unless circled here. Add'l Fee: \$99.95. NO

ANY FILING STATUS CHANGES? NONE - NO CHANGES

or EXPLAIN CHANGES and INDICATE NEW STATUS BELOW : AS OF DECEMBER 31, 2018:

Single Married filing joint Head of Household - Nondependent Name/SSN States of Residence in 2018? Married Filing Separate - Spouse's Name and SSN Qualifying Widow(er) with minor child - YR SP Died

Are you legally blind or disabled? Is your Spouse BL / Dis? Are any dependents BL / Dis? Are you, your spouse, or any dependent of yours eligible to be claimed as a dependent by someone else? Were you in a Registered Domestic Partnership, civil union or same-sex marriage during the current year? Did any births, deaths, marriages, divorces, or adoptions occur in your family since last year? Explain Details: {dates, decree, legal names, ss#, DOB}:

DEPENDENTS N/A - NONE Each dependent lived with you all 12 months & you provided > 50% support. If no, describe.

Are there any changes in your dependents from last year? [new: Relationship, Full Legal Name, SS#, DOB, FT Student, Disabled, # Mo Lived with you] Did you pay any education/college expenses for your dependents? Other School Expenses for MN K-12 credit/ded. (Form 1098T/List Exp) Did you pay any student loan interest for a dependent that you co-signed for? (Form 1098E) Did you pay any dependent care/daycare expenses for a child or other dependent so you could work? (Provider name, address, ID#, Amount) Did you engage the service of any household employees? Did any dependent have income > \$4,150? Did your dependents under age 19 (or 24 if a full time student) receive more than \$1,050 in unearned or investment income? Did you pay towards the support for a parent or someone else who you are not claiming as a dependent? Describe details.

HEALTH CARE INSURANCE

Did all members of your household/dependents HAVE HEALTH INSURANCE minimum essential coverage for ALL of 2018? Provide 1095 forms: If no, which months did each person NOT have any insurance for at least one day of the month? Form 1095-B or 1095-C If no, did your employer offer any type of coverage? Annual cost of plan if you would have taken it? Form 1095-A (need form) MNSure Marketplace (public exchange) Insurance? - Did you receive or are you eligible for a coverage exemption for not having insurance? Did you USE or have any DISTRIBUTIONS from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA and 5498-SA). Did you make any contributions to an HSA (Health Savings Account) in 2018? Was the HSA administered at your work / reported on your W2? If you or your spouse are self-employed, do you self-pay premiums that are not covered under an employer's health insurance plan? Amount?

INCOME N/A - NONE

Wages? (Include form(s) W-2) Interest income? (Include form(s) 1099-INT). Did you redeem any U.S. savings bonds? Dividend income? (Include form(s) 1099-DIV). Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account? Social security or Railroad Retirement benefits? (Include form(s) SSA-1099 & RRB-1099). Did you receive any distributions from a retirement plan? (Include form(s) 1099-R). Unemployment compensation? (Include form(s) 1099-G). Did you receive cash/check payments for work performed that was not reported to an employer or on a W2 or a 1099? Tip income? Amount? Self employment Income, commissions, or Non-employee compensation? (Include form(s) 1099-MISC). Did you receive income from a sharing economy activity (Airbnb, Uber, Lyft). Did you barter your services for goods/services from someone else? Gambling income? (Include form(s) W-2G). Be sure to include any gambling expenses if any from your lot. Other income? Ex: jury duty Did you receive or pay any Alimony? Soc Sec # of person paid: Year divorce was finalized? Did you have any credit card or debt cancelled, forgiven, foreclosed, or restructured or a bankruptcy? (Include details and 1099-C or 1099-A) Did you receive a state or local or property/rent refund, or a refund of any other deduction you itemized in a prior year? (Attach 1099-G and amount Did you make premium payments towards or receive payments from a Long-Term Care insurance contract? Who, Amount, Ins Co, Policy# Did you make a loan to someone at an interest rate below market rate? Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?

FOREIGN REPORTING N/A - NONE

Did you receive income from a foreign source or pay taxes to a foreign government? Did you own or have an interest in or signature authority over a financial account or property in a foreign country? Were you the grantor of or transferor to a foreign trust?

RETIREMENT & OTHER PLANS N/A - NONE

- Y N Did you **roll over** a retirement plan distribution into another plan or convert a traditional IRA to a Roth IRA?
- Y N Did you make a **contribution to a retirement plan** that is not reported on your W2? (401(k), IRA TRAD, IRA ROTH, SEP, SIMPLE, Qualified Plan, etc.)?
- Y N Did you have a contribution or distribution from a **529 college Svc plan** or an Achieving a Better Life Experience (**ABLE**) **savings acct**?

PURCHASES, SALES, GAINS, AND LOSSES N/A - NONE

Sale Organizer Needed?

Enclose any new Purchase/Sales/Contract Agreements or Closing Papers. And remember, dates and specific historical details are important!

- Y N Did your address change? Did you purchase a **home** or sell a main principal residence?
- Y N Did you incur **moving** expenses during the year due to a change of employment more than 50 miles away? Did you have any reimbursement for exp?
- Y N Did you claim a **First-time Homebuyer** Credit in 2008? Has there been a change in use of the home?
- Y N Did you sell any **real estate** (other than your home) during the year? (Form 1099-S)
- Y N Did you sell any other **personal assets** at a gain? or Did you purchase or sell a new vehicle, aircraft or boat that you paid sales tax on?
- Y N Did you **sell** or receive any assets using the installment method?
- Y N Did you **exchange** any property for other property?
- Y N Did you purchase any items acquired out of state, online or by mail order that **did not include sales tax**?
- Y N Did you incur a theft, condemnation, or **casualty loss** because of damaged or stolen property?
- Y N Did any security become **worthless** during 2018? Did any debts due to you become uncollectible during 2018?
- Y N Did you buy or sell any **investments** or stocks or bonds? Were you granted, or did you exercise any stock options during 2018?
- Y N Did you receive stock from a **stock bonus plan** with your employer? Did you receive a Form 2439 SH Undistributed LTCG?
- Y N Did you **exchange** any securities or investments for something other than cash?
- Y N Do you have any **short sales, commodity sales, or straddles**?

BUSINESS AND RENTAL PROPERTY INCOME & DEDUCTIONS N/A - NONE

Business Organizer Needed?

Rental Organizer Needed?

- Y N Did you include a summary of all of your business/rental/farm income and expenses?
- Y N Did you own a business interest or start / acquire a **new business** interest in a partnership, corporation, LLC, farming activity, or other venture?
- Y N Did you receive, or expect to receive, a **Schedule K-1** (or substitute K-1) from a trust, estate, partnership, or S corp?
- Y N Did you sell any part of an existing business, rental, farm, or **sell business** assets? Did you cease operating a business?
- Y N If you own rental property, do you qualify as a **Real Estate Professional**?
- Y N Did you have to file and give out any **1099 Forms** at year end for **people who you paid >\$599** to? (Rent, subcontractor work, etc)
- Y N Did you use part of your home for business purposes, such as an office?
- Y N Did you purchase any furniture or equipment for your business?
- Y N Did you make any major capital **improvements** to your business, rental, or farm properties?
- Y N Did you remove any of your business assets for personal use?
- Y N Did you make any **contributions** to a Keogh or a self-employed SEP plan for the current tax year?
- Y N Do you pay for any **health or long term care insurance** through your business?
- Y N Did you have a certain trade or business from which you figured your **DPAD** domestic production activities deduction?

Did you have a filing requirement for:

- Sales Tax
- Payroll Tax
- Information Returns

Who files and prepares these for you?

OTHER DEDUCTIONS N/A - NONE

Itemize Organizer Needed?

- Y N Did you make any cash or non-cash **DONATIONS**? (Provide receipts if total > \$500). Did you donate a vehicle or an interest in a property?
- Y N Did you take out or refinance or **HAVE A MORTGAGE** or **home equity** loan? Loan on a boat/RV with toilet, sleeping & basic living facilities?
- Y N Did you pay **PROPERTY TAXES** on property you owned or pay for vehicle license **TABS** > base? Paid federal or state **ESTIMATED TAX payments**?
- Y N Were you **required** to buy **UNREIMBURSED** items for work? RQD to **use your car** on the job (NOT commuting) or work out of town for part of year?
- Y N Did you/spouse pay any student loan interest or **college / educational expenses** for yourselves? (1098E form or 1098T form and expense totals).
- Y N Amount of original loan balance paid towards school and principal payments made during the current year?
- Y N **Are you an educator**? Did you pay for any supplies for use as an eligible educator? (Teacher, teacher aide, counselor, etc). Amount?
- Y N Did you have any investments that became worthless or were you a victim of identity theft in 2018. Victim of Identity Theft? IP PIN
- Y N Did you purchase or install any **energy efficient** or **solar** improvements or property? Did you purchase a 'clean fuel' or **electric hybrid** vehicle?

MISCELLANEOUS N/A - NONE

- Y N Were either you or your spouse in the **military** or National Guard? Did you receive any military related income in the current year?
- Y N Indicate if you made any **gifts of > \$15,000** to any one person? Did you receive any gifts valued > \$15,000?
- Y N Did you received any tax related letters, notices, or correspondence from the IRS or state? **Audit** or other inquiry or changes to a prior return?
- Y N Did you have earned income credit, child tax credit or american opportunity credit in prior years? Were any of these credits ever disallowed?
- Y N Have you paid alternative minimum tax (AMT) in previous years? Y N Did you live in an area that was declared a Federal disaster area?
- Y N Did you file Form 8839, Adoption Credit, in a previous year or incur prior or current year **adoption expenses**?
- Y N Did you receive employer-provided **adoption** benefits? Was an adoption finalized in the current year? Was it international?
- Y N Is any dependent or other person in your household NOT a **US citizen** or resident?

Any questions you would like to ask: _____

Y N ****Did you have income, expenses, or deductions that are not listed?** (Ex: Scholarships, settlements, etc) Please provide the details.

Y N ****Did you have any NONTAXABLE** or other household income sources ? Ex: Disability? VA? Work Comp? Other people living with you?
Include a summary or any form(s) or statement(s) providing nontaxable amounts.

M1PR? Organizer Needed?

Y N ****Do you expect any major changes in the upcoming year?**(retire,dependents)Please provide the details. Full Planning Needed?

SIGN _____

DATE _____

I (we) certify that I (we) have reviewed this form and there are no other changes to my (our) tax return information unless noted on the items that have been provided in writing or marked as such on this form. Any items left unchecked have been deemed not applicable for the current year. To the best of my knowledge, all information has been provided and is true, accurate, and complete.

MN DID NOT CONFORM TO THE NEW FEDERAL TAX CHANGES. IF YOU ITEMIZED PRIOR TO 2018, YOU WILL LIKELY BE ABLE TO ITEMIZE FOR MN TAX PURPOSES.