Welcome back!. We look forward to meeting your tax filing needs this year and are grateful for your business. Below is a list of documents necessary for our company to fulfill the "due diligence" requirements set forth by Internal Revenue Service. Please also fill out the questionnaire and bring it to your appointment or you can fill one out at your appointment. Feel free to contact us if you have any questions.

Copies are OK.

- Driver's License or Photo ID (FRONT AND BACK)
- Social Security Cards for all new dependents.
- If available - School or medical records showing address of all new dependents.
- IRS PIN if issued

Income Related Documents to Bring

- Form W-2 (wage and salary income)
- Form W-2G (gambling winnings)
- Form 1099-A (foreclosure of a home)
- Form 1099-B (sales of stock, bonds, or other investments)
- Form 1099-C (canceled debts)
- Form 1099-DIV (dividends)
- Form 1099-G (state tax refunds and unemployment compensation)
- Form 1099-INT (interest income)
- Form 1099-K (business or rental income processed by third party networks)
- Form 1099-LTC (benefits received from a long-term care policy)
- Form 1099-NEC (nonemployee compensation)
- Form 1099-MISC (self-employment and other various types of income)
- Form 1099-OID (original issue discount on bonds)
- Form 1099-PATR (patronage dividends)
- Form 1099-Q (distributions from an education savings plan)
- Form 1099-QA (distributions from an ABLE account)
- Form 1099-R (distributions from individual retirement accounts, 401(k) plans, and other types of retirement savings plans)
- Form 1099-S (proceeds from the sale of real estate) or closing statement from any real estate purchased or sold within the year.
- Form 1099-SA (distributions from health savings accounts)
- Form SSA-1099 (Social Security benefits)
- Form RRB-1099 (Railroad retirement benefits)
- Schedule K-1 (income from partnerships, S corporations, estates, or trusts)

Expense Related Documents to Bring

- Form 1095-A, B, or C (Health Insurance Coverage)
- Form 1098 (mortgage interest)
- Form 1098-C (charitable contribution of vehicles)
- Form 1098-E (student loan interest)

- Form 1098-MA (homeowner mortgage payments)
- Form 1098-T (tuition for higher education and related required fees)
- Business expenses (summarized by type and total paid for year)
- Childcare expenses (provider name, address, ID and total paid for year)
- Gambling losses
- Medical expenses
- Moving expenses
- Personal property tax, such as car registration paid
- Real estate tax bills paid within the tax year (regardless of which year it is for)
- Realized gain/loss report for any stocks, bonds, mutual funds and other capital investments sold during the year
- Receipts or acknowledgement letters for gifts to charity
- Rental expenses (summarized by property, type, and amount)

If you don't have all your tax documents, there are several ways to get copies.

If You are Missing Form W-2

- Ask your employer to send new a copy of your Form W-2. Some employers charge a nominal fee for this service. Employers are required by law to keep copies of your W-2 forms and other payroll information for at least four years.

If You are Missing Form 1099

- Banks may have tax documents available for downloading from their web site, or you can call their customer service number to get a new 1099-INT mailed to you.
- Investment brokers will be able to mail you a copies of Form 1099-B and 1099-DIV to report stock trading and dividend activity. Or you might be able to download copies from the brokerage web site. Be sure to download a copy of your year-end statement or a realized gain/loss report, as information in those reports can supplement the information found on the Form 1099-B.
- If you earned more than $600 as a consultant or independent contractor, your client is required to send you a 1099-MISC to report your income. Even if you didn't receive a 1099-MISC, you are still required to report the income to the IRS. Consider contacting your client for a copy of the missing 1099-MISC.
- For other types of 1099 forms, contact the organization responsible for issuing the tax form.

Name______________________________ Tax Year __________

Taxpayer Cell__________________Email______________________________

Spouse Cell__________________ Email______________________________

Personal Information.	**Yes**	**No**
Did your marital status or living arrangements change during the year?	☐	☐
Did your address or other phone numbers change from last year?	☐	☐
Can you be claimed as a dependent by another taxpayer?	☐	☐
Were you or your spouse a full-time volunteer firefighter or ambulance worker?	☐	☐
Did anyone in your household have health insurance through a state or federal exchange?	☐	☐
Has the IRS ever issued an Identity Protection PIN for anyone on your return?	☐	☐
Dependent Information		
Were there any changes in dependents (or their residence) from the prior year?	☐	☐
Any dependents under age 24 have interest/dividends/capital gain in excess of $2,300?	☐	☐
Did you pay or incur expenses for dependent day care services?	☐	☐
Purchases, Sales and Debt Information: During the tax year above did you…		
Start or acquire a new business, partnership or S Corp?	☐	☐
Sell, exchange, or purchase any real estate?	☐	☐
Sell or exchange any stocks, bonds, or mutual funds?	☐	☐
Purchase any alternative home energy system (Solar, Geo) or Electric vehicle?	☐	☐
Refinance, modify, or take out a home equity loan?	☐	☐
Sell an existing business, rental, or other property?	☐	☐
Income Information: During the tax year above did you…		
Receive any income from renting any property?	☐	☐
Receive any income from self-employment?	☐	☐
Pay any unincorporated subcontractors more than $600.00?	☐	☐
Contribute to (or convert) an IRA, Roth IRA, or Annuity?	☐	☐
Withdraw from IRA, 401k Roth, Pension, 403b, 457, SEP, Simple, Keough?	☐	☐
Contribute to or withdraw from an education savings/529 Plan account?	☐	☐
Receive any Social Security or disability income?	☐	☐
Receive any unemployment benefits?	☐	☐
Receive any gambling, wager, or lottery income?	☐	☐
Have any debts or portions thereof cancelled or forgiven?	☐	☐
Cash in any Series EE or I U.S. Savings bonds?	☐	☐
Itemized Deduction Information: During the tax year above did you…		
Incur a casualty (fire, flood, wind, etc) or theft loss?	☐	☐
Receive evidence to substantiate monetary charitable contributions?	☐	☐
Make any non-cash charitable contributions (clothes, furniture, cars, etc.)?	☐	☐
Keep written evidence of business use of your vehicle?	☐	☐
Work out of your local region for part of the year (overnight business travel)?	☐	☐
Have any education expenses (including student loan interest)?	☐	☐
Have any expenses related to seeking a new job?	☐	☐
Make any major purchases during the year (cars, boats, etc.)?	☐	☐

Miscellaneous Information: During the tax year above did you…

	Yes	No
Make any out-of-state purchases (by telephone, internet, mail, in person) where the seller did not collect your resident state's sales or use tax?	☐	☐
Make gifts of more than $16,000 to any individual?	☐	☐
Make any repayments of the First Time Homebuyers Credit?	☐	☐
Engage in any bartering transactions?	☐	☐
Incur moving costs because of a job change?	☐	☐
Have any foreign income or pay any foreign taxes?	☐	☐
Have an interest in or signature authority over any foreign financial account or trust?	☐	☐
Trade in any Crypto currency?	☐	☐
Receive correspondence from the State or the Internal Revenue Service?	☐	☐
Want to designate $3 to the Presidential Election Campaign Fund?	☐	☐
Were there any other income or expense items that may affect your tax return?	☐	☐

If you would like any refunds by direct deposit or any taxes due paid by direct debit please fill out banking information here. Or mark this box to use same account as last year ☐

Bank Name______________________________Routing #____________________________________

Your Acct#____Type_______________ (ck,sav,mm.IRA)

Type of return copy requested. Please mark at least one. You can mark both.

☐ Paper

☐ PDF to email: ☐ Taxpayer ☐ Spouse Other_____________________________________

TAX RETURN REVIEW AND CERTIFICATION

I certify that I have been given a copy (paper or electronic) of my federal, state(s), and local (if applicable) income tax return(s) (Form 17, 1040, Form 1040A, Form 1040EZ, Form 1041, Form 990-T) for the tax year above; that the tax return and filing instructions were explained to me, that I have reviewed the specific numbers on the tax return, and that to the best of my knowledge they are complete and correct and do not contain any material misstatements, errors, or omissions and that I am responsible for maintaining the documentation necessary to substantiate all entries on the return.

I further certify that if my tax return is not filed via magnetic media, that The Quest Corp. has informed me that they may be required to electronically file my above referenced tax return if they file it with the IRS on my behalf. If I do not want to file my return electronically and choose to file my return on paper forms, my preparer will not file my paper return with the IRS. Instead, I will file my paper return with the IRS myself. I was not influenced by The Quest Corp or any member of that firm to sign this statement.

I further certify that I have been notified of the privacy policy of The Quest Corporation, which has been attached to the tax return copy. I understand that full payment for preparing these taxes is due at the time of service and that any payments made after 10 business days from the date of delivery of taxes are subject to monthly late payment fees.

________________________________ ______________

Taxpayer Date

________________________________ ______________

Spouse Date