

Preparer - Enter on Screen Contact

Tax matters person (Indicate which spouse handles tax return related questions) (Blank = Both, T = Taxpayer, S = Spouse) _____ [8]

Taxpayer email address _____ [9]

Spouse email address _____ [10]

Taxpayer

Spouse

Fax telephone number _____ [11] _____ [19]

Mobile telephone number _____ [12] _____ [20]

Mobile telephone #2 number _____ [13] _____ [21]

Pager number _____ [14] _____ [22]

Other: _____ [15] _____ [23]

 Telephone number _____ [16] _____ [24]

 Extension _____ [17] _____ [25]

Preferred method of contact: _____ [18] _____ [26]

 Email, Work phone, Home phone, Fax, Mobile phone, Mobile phone #2 _____ [18] _____ [26]

NOTES/QUESTIONS:

Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below.

Mark to verify all accounts listed below have been reviewed, updated as needed, and are correct. __ [1]

Primary account:

Financial institution routing transit number _____ [3]
 Name of financial institution _____ [4]
 Your account number _____ [5]
 Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __ [6]
 Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __ [7]
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __ [8]
 Enter the maximum dollar amount, or percentage of total refund Dollar _____ [9] or Percent (xxx.xx) _____ [10]

Secondary account #1:

Financial institution routing transit number _____ [25]
 Name of financial institution _____ [26]
 Your account number _____ [27]
 Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __ [28]
 Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __ [29]
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __ [30]
 Enter the maximum dollar amount, or percentage of total refund Dollar _____ [11] or Percent (xxx.xx) _____ [12]

Secondary account #2:

Financial institution routing transit number _____ [31]
 Name of financial institution _____ [32]
 Your account number _____ [33]
 Type of account (1 = Savings, 2 = Checking, 3 = IRA*) __ [34]
 Mark if married filing jointly and this is a joint account (Both taxpayer and spouse names are on the account) __ [35]
 Mark if financial institution is foreign based (Not located in the territorial jurisdiction of the United States) __ [36]
 Enter the maximum dollar amount, or percentage of total refund Dollar _____ [15] or Percent (xxx.xx) _____ [16]

*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Refund - U.S. Series I Savings Bond Purchases

A tax refund may be used to buy up to \$5,000 of U.S. Series I Savings bonds and registered for up to three different persons. If you would like to purchase U.S. Series I Savings bonds (in increments of \$50) with your refund, if applicable, please complete the following information. Please note you may enter only one name per registration (with exception of married filing joint returns) and must enter the party's given name, do not use nicknames.

Indicate either a maximum dollar amount (up to \$5,000), or percentage of refund you would like used to purchase bonds

The bonds will be registered to the name(s) on the return. For married filing joint returns this means the bonds will be registered in both names listed on the return.

To register the bonds separately, leave these fields blank and use the fields provided below.

Enter either a dollar amount or percent, but not both Dollar _____ [13] or Percent (xxx.xx) _____ [14]

Bond information for someone other than taxpayer and spouse, if married filing jointly

Maximum dollar amount (up to \$5,000), or percentage of refund used to purchase bonds Dollar _____ [17] or Percent (xxx.xx) _____ [18]
 Owner's name (First Last) _____ [38] _____ [39]
 Co-owner or beneficiary (First Last) _____ [40] _____ [41]
 Mark if the name listed above is a beneficiary __ [42]

Bond information for someone other than taxpayer and spouse, if married filing jointly

Maximum dollar amount (up to \$5,000), or percentage of refund used to purchase bonds Dollar _____ [21] or Percent (xxx.xx) _____ [22]
 Owner's name (First Last) _____ [43] _____ [44]
 Co-owner or beneficiary (First Last) _____ [45] _____ [46]
 Mark if the name listed above is a beneficiary __ [47]

Beacon Tax Services Questionnaire 2019

Personal Information

	Y	N
Did your marital status change during 2019? <i>If yes, explain:</i> _____	<input type="checkbox"/>	<input type="checkbox"/>
Did your address change during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you retire or change jobs this year?	<input type="checkbox"/>	<input type="checkbox"/>
Were there any changes to banks/bank accounts or routing numbers for the accounts accessed on last years tax returns (for refunds/payments)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you, your spouse and/or any dependents have a taxpayer identification number (ITIN or ATIN)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, please provide the IRS letter.	<input type="checkbox"/>	<input type="checkbox"/>
Did you reside in or operate a business in a Federally-declared disaster area?	<input type="checkbox"/>	<input type="checkbox"/>
Did you reside or work outside of the United States at anytime in 2019?	<input type="checkbox"/>	<input type="checkbox"/>

Dependent Information

	Y	N
Were there any changes in dependents from 2018? <i>If yes, explain:</i> _____	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any dependent children with investment or dividend income in excess of \$2,200? (child under age 19 or full-time student under age 24)	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any dependents who must file a tax return?	<input type="checkbox"/>	<input type="checkbox"/>
Did you provide over half the support for any other person(s) other than your dependent children during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any expenses related to the adoption of a child in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
If you are divorced or separated with children, do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	<input type="checkbox"/>	<input type="checkbox"/>
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have been a victim of identity theft? <i>If yes, please provide the IRS letter.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay an individual or an organization to perform services for the care of a dependent under 13 years old, in order to enable you to work or attend school on a full-time basis?	<input type="checkbox"/>	<input type="checkbox"/>

Purchases, Sales and Debt Information

	Y	N
Did you sell, exchange or purchase any real estate during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell or purchase a principal residence during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you foreclose or abandon a principal residence/real property during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you start a new business or purchase rental property during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange or purchase any assets used in your trade/business?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire or dispose of any stock during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance a principal residence or second home in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell an existing business, rental or other property in 2019?	<input type="checkbox"/>	<input type="checkbox"/>

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Did you lend money with the understanding of repayment and this year it became totally uncollectable?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts cancelled or forgiven in 2019 (home mortgage/student loan)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a qualified plug-in, electric drive vehicle or qualified fuel cell vehicle?	<input type="checkbox"/>	<input type="checkbox"/>

Income Information

	Y	N
Did you have any interest or dividend income?	<input type="checkbox"/>	<input type="checkbox"/>
Did you cash any US Savings bonds in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any foreign income or pay any foreign taxes during 2019, either directly or indirectly, such as from investment accounts, partnerships or foreign employer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any income from property sold prior to 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any unemployment benefits during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability income during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive tip income not reported to your employer during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your life insurance policies mature or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any awards, prizes, hobby income, gambling/lottery winnings?	<input type="checkbox"/>	<input type="checkbox"/>
Do you expect a large fluctuation in income, deductions or withholdings in 2020?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive, sell, exchange or otherwise acquire any financial interest in virtual currencies in 2019?	<input type="checkbox"/>	<input type="checkbox"/>

Retirement Information

	Y	N
Are you an active participant in a pension or retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Social Security benefits during 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP 401(k) or other qualified retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any lump-sum payments from a pension, profit-sharing or 401(k) plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP 401(k) or other qualified retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>

Education Information

	Y	N
Did you, your spouse or your dependents attend a post-secondary school in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any post-secondary educational expenses on behalf of yourself/spouse or dependent? If yes, provide Form 1098-T and receipts for qualified tuition/related expenses.	<input type="checkbox"/>	<input type="checkbox"/>
Did anyone in your family receive a scholarship of any kind in 2019? If yes, were any of the scholarship funds used for expenses other than tuition, such as room & board?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an education savings/529 Plan account? If yes, were any of these withdrawals rolled over into an ABLE account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest in 2019? If yes, provide Form 1098-E	<input type="checkbox"/>	<input type="checkbox"/>
Did you cash any Series EE or US savings bonds issued after 1989?	<input type="checkbox"/>	<input type="checkbox"/>

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Health Care Information

	Y	N
Did you have qualifying health care coverage (employer-sponsored or Medicare/Medicaid) for your family in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you enroll for lower-cost Marketplace coverage through the ACA? If yes, provide Form 1095-A.	<input type="checkbox"/>	<input type="checkbox"/>
Did you enroll for lower-cost Marketplace coverage through the ACA and share a policy with anyone who is not included in your family? If yes, provide Form 1095-A.	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to a HSA or Archer MSA?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any distributions from an HAS, Archer MSA or Medicare Advantage MSA in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay long-term care premiums for yourself/spouse or family in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to a ABLE account? If yes, provide Form 5498-QA	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any withdrawals from an ABLE account? If yes, provide Form 1099-QA.	<input type="checkbox"/>	<input type="checkbox"/>
If you are a business owner, did you pay health insurance premiums for your employees in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, provide Form 1099-H	<input type="checkbox"/>	<input type="checkbox"/>

Itemized Deductions Information

	Y	N
Did you incur a casualty/theft loss or any condemnation awards in 2019? If yes, did the loss occur in a Federally declared disaster area?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay out-of-pocket medical expenses (co-pays/Rx drugs/etc)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any cash or non-cash charitable contributions? If yes, provide receipt/letter of acknowledgement to substantiate all contributions made.	<input type="checkbox"/>	<input type="checkbox"/>
Did you donate a vehicle or boat in 2019? If yes, provide 1098-C or written acknowledgement from donee organization.	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay real estate taxes for your primary home and/or second home?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any mortgage interest on an existing home loan? If yes, provide any Form 1098 received from lender	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur any interest expenses associated with any investment accounts?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any major purchases during 2019? (cars, boats, etc)	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any out-of-state purchases for which the seller did not collect state sales or use tax?	<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous Information

	Y	N
Did you incur any job related expenses that were not reimbursed by your employer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make gifts of more than \$15,000 to any individual in 2019?	<input type="checkbox"/>	<input type="checkbox"/>
Did you utilize an area of your home for business purposes?	<input type="checkbox"/>	<input type="checkbox"/>
Did you engage in any bartering transactions?	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur moving expenses due to a permanent change of station as a member of the Armed Forces on active duty?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any individual as a household employee in 2019?	<input type="checkbox"/>	<input type="checkbox"/>

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Did you make energy-efficient home improvements to your primary home?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a distribution from or were you a grantor/transferor for a foreign trust?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a financial interest in or signature authority over a financial account such as bank account, securities account or brokerage account located in a foreign country?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any foreign financial accounts, foreign financial assets or hold interest in a foreign entity?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive correspondence from the IRS, state or local income tax agency? If yes, provide a copy of the correspondence.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have previous years of tax returns that are unfiled or filed with unpaid balances due?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to designate \$3 to the Presidential Election Campaign Fund? If yes, it will not change your tax or reduce your refund.	<input type="checkbox"/>	<input type="checkbox"/>

Estimated Tax Payments

	Y	N
Did you make any estimated tax payments to the IRS for 2019 ?	<input type="checkbox"/>	<input type="checkbox"/>
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Did you make any estimated tax payments to the state for 2019 ?	<input type="checkbox"/>	<input type="checkbox"/>
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Did you make any other estimated tax payments (local or non-resident state) for 2019 ?	<input type="checkbox"/>	<input type="checkbox"/>
Name of state or locality: _____		
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		
Date paid: _____ Amount: \$ _____		