

# PERSONAL INFORMATION WORKSHEET

**Provide the completed worksheet and the associated documents via Intuit Link. Prior year clients can skip SECTIONS 1 and 2 if there are no changes. Everyone has to answer questions in SECTION 3 and sign/date the document.**

## SECTION 1: Personal Data

	Taxpayer	Spouse
Last Name		
First Name & Initial		
Social Security Number		
Occupation		
Date of Birth		
Email Address		
Phone		
Mailing Address		
City, State, Zip		
<b>Direct deposit bank routing #</b>		
<b>Direct deposit bank account #</b>		
Health Insurance Coverage*		

\*If you chose to report, was everyone on the tax return covered by health insurance all of 2018? If not, for which months and persons was coverage applicable? If you received your health insurance from healthcare.gov, please provide associated tax statement (form 1095).

## SECTION 2: Dependent Data

	Dependent #1	Dependent #2
Last Name		
First Name & Initial		
Relationship		
Social Security Number		
Date of Birth		
Child Care Expenses		
Health Insurance Coverage*		

## SECTION 3: Miscellaneous

1	Are you self-employed or do you receive hobby income? Fill out BUSINESS PROFIT & LOSS WORKSHEET located at <a href="http://www.bender-cpa.com/resources">www.bender-cpa.com/resources</a> .	
2	Did you receive income from gravel, timber, oil, gas, copyrights, patents?	
3	Did you withdraw or write checks from a mutual fund?	
4	Did you provide a home for or help support anyone not listed in Section 2 above?	
5	Did you have a foreign bank account, trust, or business? Did you own \$50,000 or more in foreign financial assets?	
6	Did you receive any correspondence from the IRS?	
7	Did you give a gift of more than \$15,000 to one or more people?	
8	Did you have any debts cancelled, forgiven, or refinanced?	
9	Did you pay expenses to attend classes beyond high school?	

10	Did you have any children under the age of 19 or 19 to 23 year old students with unearned income (capital gains, dividends, and interest) of more than \$1050?	
11	Did you install any energy property to your residence such as solar water heaters, generators or fuel cells or energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters?	
12	Have you or your spouse been a victim of identity theft and given an identity theft protection PIN by the IRS? If yes, enter the six digit identity protection PIN number.	
13	Did you make IRA (Individual Retirement Account) contributions for current tax year?	
14	Did you buy a car during the current tax year?	

*Please provide the following:*

Support for sources of income:

- Form(s) W-2
- Form(s) 1099 - Interest, Investment Income, Retirement Distributions
- Form(s) 1099B - Investment Sales
- Schedule(s) K-1
- Unemployment Income

Support for itemized deductions:

- Mortgage interest - Form 1098-INT
- Receipts for real estate taxes paid
- Charitable donations (cash and non-cash) amounts
- Summary of medical expenses out-of-pocket (if the total exceeds 7.5% of your income)
- Support for large purchases (cars, boats, etc...) for the sales tax deduction

Support for other adjustments or credits:

- Student Loan Interest
- IRA Contributions
- Tuition and Education Expenses (for you or your dependents)
- Day Care Expenses
- Out-of-pocket Expenses for Qualified Educators
- HSA Contributions

If you bought or sold a home during the year, please provide copies of the settlement statement (HUD)

If you bought a car during the year, please provide a copy of the bill of sale

Date and amount of any estimated tax payments made during the year, if any.

**To the best of my knowledge the information provided in this worksheet and Intuit Link is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax return for which I have adequate records.**

Taxpayer's Name	Date	Spouse's Name	Date