VIMLAN TAX SERVICES, LLC.

2013 **Domestic Tax Questionnaire**

Reset Form

NAVIGATING YOUR FINANCIAL SUCCESS

Print Form

Full Name (as on SSN Card): DOB: Current Visa Type: Issued: SSN #:

Spouse: (as on SSN card/ITIN Ltr): DOB: Current Visa Type: Issued: SSN or ITIN #:

Street Address: **OR** Select if Applicable...for Spouse

City: State/Province: ZIP/PIN Code:

US Cell #: Foreign Ph #s: Personal Email Address(es):

Enter # received of each, attach to your tax docs, and mark the appropriate checkbox. NA means not applicable: Yes No NA

1. Number of **W2s**______ & Number of **W2-Gs** (for gambling winnings)________
2. Number of **1099-Int** (Interest Earnings)______ ***If you have any foreign accounts, do fill the*** 8938 Matrix xlsx template (You might also have to efile an FBAR).
3. Number of **1099-Div**______ (Dividend Earnings from Stock, Mutual Fund Accounts)
4. Number of **1099-B**______ (Brokerage Statement - **Provide also, the Excel Realized Gains for the year**); Else fill our stock sales sheet. Please provide any other cost basis supplementary info, such as if you were a participant in **Employee Stock Option or Purchase Plan (ESOP), RSUs, or NQSOs**
5. Number of **1099-R**______ (Pension/IRA/401K transfer/rollover/liquidation; **ALSO APPLIES TO INTERNATIONAL PENSIONS**
6. Number of **1099-M**______ (For self employed & miscellaneous income). ***And/or SSA-1099*** (if you're collecting Social Security Payments)
7. ***Homebuyer Credit: Have you claimed a credit on 2008 tax return, moved out, or sold your home? If so, click here to know your payback***
8. Number of **1099-Q**______(Withdrawals from a 529 Education Plan or a Coverdell Education Savings Account)
9. Number of **1099-G**______ (Prior year state refund -- IL filers, click here -- or ***Unemployment Earnings:*** -- IL filers, click here)
10. Number of **1098-INT**______ (mortgage interest statements; bring all which you have, for all properties)
11. Number of **1098-E**______ (student loan interest)
12. Number of **1098-T**______ (Student tuition statement -- See question 28 below)
13. Number of **Property tax statements**______ (for all real estate you own - NEED County PIN Numbers)
14. Number of **1099-S / HUD-1 Closing Settlement Statements**______ (for any property you bought or sold last year; see also question 37 on page 2)
15. Number of **K1s**______ (are you a partner or a shareholder in an LLC or S-Corp? Publicly Traded Oil Partnerships are an example)
16. Number of **1099-C**______ (Cancellation of Debt) or Number of **1099-A**______ (Property Abandonment) **;** both used for foreclosures
17. Number of **1099-SA]]]]]] & 5498-SA**______ (for Health Savings Account Distributions and Contributions, if you had an HSA in 2013)
18. **IF YOU OWN FOREIGN MUTUAL FUNDS, YOU NEED TO FILL** THIS FOREIGN MUTUAL FUND EXCEL "XLSM" TEMPLATE **ON OUR WEBSITE**

If you wish to do direct deposit refund/auto draft your tax, please provide following: **Bank Name:** **Checking:** **Savings:** **Joint?**

Routing #: **Account #:**

19a. Timeline of countries, states, *counties* **LIVED** in, in 2013:

19b. Timeline of countries, states, *counties* **WORKED** in, in 2013:

20. Notes you wish to add pertaining to your situation:

FILL OUT QUESTIONS 21 THROUGH 25 HERE ONLY, IF YOU WERE NOT A GREENCARD OR A CITIZEN IN 2013. ALL OTHERS, LEAVE BLANK.

21. If not a GC Holder or US Citizen, give first entry date & # of days present in USA from 2011-2013, EXCLUDING TRAVEL DAYS: 1st US Entry Date between 2009-2013: 2011: 2012: 2013:

22. Visa or immigrant status on 12/31/13: Answer only if not a US Citizen **23.** Return Filed Last Year **(Provide Copy):** Yes No NA

24. Ever changed visa or USCIS status, please describe change & when done: Answer only if not a US Citizen **25. Ever had a US Green Card or US Citizenship and given it up?**

26. Made any energy improvements to your primary home in 2013? If so, please describe the improvement done by you: Amt:

27. Did you move more than 50 miles due to a change in employment

A. If yes, provide unreimbursed cost amount (you must have proof in forms of receipts)

B. How many total miles did you move from your old home, to your new home?

28. Amount spent on books, tuition, & supplies: **1098-T** is required for you to deduct tuition, else we need the federal tax id of your college or university. . You can only take supplies credit if you were an undergrad last year.

A. Out of Pocket Tuition Cost: B. Supplies (click here to know more); new laptop only allowable if required to attend a class:

29. Only provide **total sales tax paid *if it's more than total of:*** (your state income deducted from your W2s plus your 2013 estimated state income tax payments). **Else, you can use the IRS Sales Tax Calculator** link:

30. If you bought a new hybrid or plug-in electric car, give the manufacturer, make, model, year. **Click here** to know more. Date Bought: Total Invoice Amount:

31. Have you contributed or will you be contributing (deadline 04/15) to your, and/or your wife's ROTH/ or regular IRAs?

Your Account: Amount: Wife's Account: Amount:

32. Were your PAYMENTS for medical expenses for you or a family member equal to or more than 10.0% of your total income last year. Medicines: Doctors: Hospitals:

If yes, provide a categorization of expenses on a separate sheet.

33. Have you contributed or will you be contributing to your Health Savings Account (HSA) this year? If doing this by April 15th, please state.

REMEMBER, IF YOU TOOK OUT MONEY FROM YOUR HSA LAST YEAR, WE NEED THE DISTRIBUTION FORM (1099-SA) FROM YOUR BANK.

Single or Family Contribution: Separate HSA for Spouse, if applicable

34. Provide total of any state income taxes you paid in 2013 as result of any tax filings you did in 2013, and any 2013 estimated state income taxes paid last year:

35. Did you use a babysitter/daycare provider? If so, please provide the following info on your providers, including TOTAL amount spent for all children under 13 years of age in tax year, and for all disabled persons. **ENTER COST FOR EACH CHILD IN DEPENDENT GRID BELOW. Attach additional sheets for extra providers.**

1st Provider Name: | **2nd Provider Name:**

1st Provider FULL Address: | **2nd Provider FULL Address:**

TAX ID # of 1st Provider: | **1st Provider Cost:** | **TAX ID # of 2nd Provider:** | **2nd Provider Cost:**

36. Did you make any charity donation to an established US-Based Charity and have proof of it? If yes, please provide proof. Cash means check, credit card, cash. ***Also deductible on Colorado return, if you are filing Colorado state return.***

If NonCash Item, Please Specify: and/or Cash donation:

Estimate Value of NonCash Item | Mileage (Roundtrip) for Charity Service work:

37. Did you own any rental or investment property, other than your primary home? **Did you convert your primary home** into a rental home (or vice versa)? **Or have you moved out** of your primary home and still own it? **If yes** to any of those 3 questions, please fill out our income and expense template , or provide your own with conversion or move out date. Also, remember to provide your closing statements (HUD-1 statements) if you sold or bought properties (mentioned in question 12).

38. Please list your dependents. If they do not have socials or ITINS and need to apply for them, please state so from the drop-down box. You can claim dependent parents/relatives if they are visiting you from another country under extenuating circumstances. Please call for that info. Please **SEE NEW IRS ITIN INSTRUCTIONS** for proper documentation to apply for spouse or dependent ITINS.

Name of Dependent	D.O.B.	Relationship To You:	SSN# or ITIN#	Status (if no ITIN# or SSN#)	Visa Type on 12/31	Daycare Cost Spent in 2013

State Section:

39. Massachusetts filers, please provide the following amounts spent by you last year:

*Also, Please **provide your 1099-HC** from your employer or Health Insurance Company if you want to avoid the penalty from Massachusetts for not having health insurance proof.*

a) Medical/Dental

b) Fast Lane Toll

c) MBTA Transit

If you cannot provide your **1099-HC document,** then fill out following grid:

Taxpayer or Spouse (T/S)	Name of Insurance Company	Federal ID #	Subscriber #(usually on card)

40. Illinois & Minnesota Filers, did you have any children in KG-12 last year any money for their schooling expenses? (example: tuition, books, lab fees, instruments, supplies, equipment, etc.) KUMON & tutoring program costs NOT allowed for IL..For MN it's ok. *Provide a separate sheet if necessary.*

Name of Child	SSN# or ITIN#	(K-12)-Last Yr	School Name	School City	Total Cost

41. Education 529 Plan Participants:, *how much* did you put into your children's state sponsored **education plans** last year? ***Bright Start, Bright Directions, or College Illinois*** are three sponsored plans by Illinois. Some states also allow deductions for contributions:

42. For all renters, please give last year's rent expense here. (CA, IN, MA, MI, MN, MO, NJ, PA, & WI have rental deductions/credits). PA & MO are for those 65 & older, widows & widowers 50 & older, and those disabled 18 & older.

Rent Paid Last Year

43. Was heating/gas expense included in rent you paid? If yes, please provide amount here: Yes ☐ No ☐

Heat Included if any | # Months Rented

44. Minnesota Renters, please provide your **M-1PR document.**

45. Indiana Renters, give Landlord Name & Address, & your rental address if different from your mailing address &/or Landlord address. Attach additional sheets if more than one Indiana residence.

Landlord Name	Landlord (address, city, state, zip)	Your Rental (Address, city, state, zip)

46. Wisconsin: Medicare Part B & D Premiums Paid:

47. New Mexico: Give total Med Exp Last Year:

48. Connecticut taxpayers, your vehicle taxes:

49. Georgia taxpayers, if your bought/leased/converted a car which is a low/zero emission vehicle, there is a 10%/20% credit. State your cost:

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PRINT FORM

EXPENSES FOR SOLE PROPRIETORS: ***FILL OUT EVERYTHING AS THE CATEGORIES APPLY TO YOU.***
EXPENSES INCURRED DURING YOUR W2ed EMPLOYMENT, ***FILL OUT ONLY FOR 2ND OR MULTIPLE JOB SITES:*** **FILL OUT EXTRA SHEETS AS NECESSARY, FOR E.G., IF YOU HAD EXPENSES IF YOU WERE AN EMPLOYEE & A SOLE PROPRIETOR.**

RESET FORM

	Taxpayer	Spouse	Total
Transportation/Travel Expenses (While Away from Main Job Site)			
-- Parking (while away) on a project, temporarily from your regular workplace:			$0.00
-- Roadway Tolls (only incurred as part of going to 2nd or mutiple job sites:			$0.00
-- Lodging:			$0.00
-- Car Rental Charges:			$0.00
-- Airfares:			$0.00
-- Laundry Charges (only while away):			$0.00
-- Other Miscellaneous Travel (Please specify below, if possible):			$0.00
Eg: Job Hunting Expenses for a job in your same occupation (resume mailing, travel to look for jobs; can't be for a first time job):			
			0
BUSINESSS mileage driven, to/from client and project sites, from 1st job to 2nd job, NOT commuting from home to main site:			$0.00
-- Year of Car:			
-- Make and Model of Car:			
-- Date you Bought Car:			
-- Did you take actual vehicle expenses & not mileage method on last year on your tax return also?:	Please Select	Please Select	
-- Meals (lunch, dinner) you spent on overnight trips for work, at client sites, if required to stay at client site during meals:			$0.00
Supplies & Tools (-- e.g., laptop, software, job training education, uniform, boots, tools, etc.)			
-- New Laptop Purchase Cost:			$0.00
-- Job Training (Not your MBA Tuition), but rather, work-related or sponsored classes/training:			$0.00
-- Uniform Cost (Not your everyday suits or clothes; E.g.: janitors, policemen, mechanics all have uniform costs):			$0.00
-- Tools Cost (If you're a white collar professional, you probably have no tool costs! If so, describe in detail below please:			$0.00
-- Other Miscellaneous Costs (Please describe below) :			$0.00
Utilities expense (cell phone, home phone line strictly for business use, and internet charges as they relate to work)			
-- Mobile/Cell Phone Charges:			$0.00
-- Home Telephone 100% used for Business:			$0.00
-- Internet Usage for Work:			$0.00
--- Other Miscellaneous Costs (Please list below):			$0.00
-- Attorney fees (tax advice portion only!) and Tax Accountant/Filing Charges:			$0.00
-- Office Expense (rent for expense, office furniture, only if used for your area which you STRICTLY use for business):			$0.00
	Health	Health	
--Insurance (Health, or Car). If your employer already DEDUCTS health ins pretax, from your paycheck, leave this blank:			$0.00
-- Repairs for car driven more than 50% for going to 2nd or multiple job sites. Leave blank if only one job site: describe below:			$0.00
JOB HUNTING EXPENSE			
-- Postage (must be for sending your business expenses, if you are self employed. If you're not self-employed, LEAVE BLANK):			$0.00
-- Contract Labor (anyone else you hired, gave money to for accomplishing a business task):			$0.00
-- Advertising Expense (for advertising your business):			$0.00
-- Immigration Expense (Visa Transfer Fees, Greencard Application fees/renewal, New Visa App fees, ALL WHICH YOU PAID):			$0.00
-- Visa Stamping & associated travel fees for stamping is only allowed if your employer requires you to get stamped to remain employed.			
$0.00			$0.00