

CLIENT DISCLOSURE FOR 2015 INCOME TAX RETURN PREPARATION

Client Name: _____

In order to prepare your tax return correctly, please answer yes or no to ALL of the following:

YES	NO
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Income

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 Do you have income that is not reported on W-2, K-1, or 1099 forms?

Filing Status

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 Did you get married, separated, divorced, or widowed during the year?

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 Can you or your spouse be claimed as a dependent by someone else?

Dependents

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 Did the status of your dependents change from last year?

Foreign Assets

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 Do you have an interest in any assets, bank accounts, or trusts in a foreign country?

Sales Tax

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 Do you have Wisconsin sales tax due from internet, mail order or out of state purchases?

Barter Transactions

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 Are you engaged in bartering transactions during year?

If you have any of the following, please answer yes or no:

YES	NO
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Rental Property Income

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 Do you have receipts and records to support your rental income and expenses?

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 Did you buy, sell or convert rental property during the year?

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 Did the ownership or usage percentage of rental property changed from last year?

Self-Employed Business Income

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 Do you have receipts and records to support your business income and expenses?

Stock Sales

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 Do you have documentation to support your original cost/basis for stock sold during year?

Office in Home Deduction

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 Do you have documentation to support percent of home used as office exclusively for business?

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 Do you have documentation to support expenses related to office in home?

Medical Expense Deduction

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 Do you have receipts for all medical expenses?

Employee Expense Deduction

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 Do you have receipts and documentation for unreimbursed employee expenses?

Earned Income Credit

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 Do you have the necessary information and documentation required for Earned Income Credit?

Client Signature

Date