

Questionnaire 2017

Students and Other Dependents

Please check the appropriate box and include all necessary details

When in doubt, please check "Not Sure" so that we can discuss the issue with you.

Name: _____ Spouse: _____

Contact Information

E-mail address(es): _____ or I don't use e-mail

Best phone number to reach you _____

How do you prefer to be contacted? e-mail PhoneHow would you prefer to receive your copy of your return? paper copy PDF emailed

Personal Information

Did you marry, divorce, separate or become a widow death during the year? Yes No Not Sure

If yes, explain: _____

Do you want us to use your parents' address on your return? Yes No Not SureDid your address change from last year? Yes No Not Sure

New Address: _____ Date Moved: _____

Do you want any refund to get directly deposited to your bank? Yes No Not Sure

If yes, Bank Name _____ Account # _____

Is it a checking or savings account? (if not a local bank, please attach voided check)Do you have any children who live with you? Yes No Not Sure

Purchases, Sales and Debt Information

Did you **buy or sell stock** during the year (other than in a retirement acct?) Yes No Not SureDid you have any debts, such as credit card bills, forgiven or settled for less? Yes No Not SureDid you pay any **student loan** interest this year? (We need the 1098-E) Yes No Not Sure

Income Information

Please make sure we have all W-2s and 1099s issued to you.

Do you have any income from hobbies or odd jobs? Yes No Not Sure

Please check yes or ??? if you:

Sell produce or farm products, sell items through home parties, get paid to teach classes or monitor tests or sell on-line (other than personal items at no profit.)

Describe briefly: _____

Do you receive payment for any work you did that you **don't have** a W-2 or 1099 for? Yes No Not SureDid you win any **prizes** (not just **money**) from bingo, raffles or gambling? Yes No Not SureDid you have any foreign income or pay any foreign taxes during the year? Yes No Not SureDid you withdraw money from an IRA, or other retirement account? Yes No Not SureDid you withdraw money from an education savings (529) plan? We need 1099Q Yes No Not SureDid you receive **tip income not reported to your employer** this year? Yes No Not SureDid you cash any U.S. Savings bonds? Yes No Not Sure

Miscellaneous Information

- Did you, attend college during the year? Yes No Not Sure
- If yes, please get a copy of the **1098-T** and a **statement** of your account from the college.
You can usually get this information on line. Give this to your parent or other person who claims you as a dependent.
- Do you have a felony drug conviction? Yes No Not Sure
- Have you been the victim of **identity theft**? Yes No Not Sure
(not just notification of a data breach)
- Have you ever lived in or do you have any connection with any **foreign countries** including Canada? Yes No Not Sure
- Did you receive correspondence from a state tax department or the IRS ? Yes No Not Sure
If yes, please give us a copy or explain: _____
- Did you contribute to an IRA (other than through your employer)? Yes No Not Sure
- Would you like to discuss contributing to an IRA before April 15 to save taxes? Yes No Not Sure

Use Tax: (New Hampshire residents can disregard)

Use tax is due on items you purchase without paying sale tax and then USE in Vermont. This includes items purchased in NH or on line or from a catalogue where the seller doesn't collect sales tax. **If you shop at Walmart in Hinsdale or Target in Keene for anything other than clothes, prescriptions and food, you owe use tax.** Amazon is now collecting sales tax from Vermont customers but not all of their vendors do.

ADJUSTED GROSS INCOME	USE TAX IS:	ADJUSTED GROSS INCOME	USE TAX IS:
Up to \$10,000	\$5	\$50,001-\$60,000	\$50
\$10,001-\$20,000	\$10	\$60,001-\$70,000	\$60
\$20,001-\$30,000	\$20	\$70,001-\$80,000	\$70
\$30,001-\$40,000	\$30	\$80,001-\$90,000	\$80
\$40,001-\$50,000	\$40	\$90,001-\$100,000	\$90
\$100,000 or more, 0.1% (.001) of AGI or \$500, whichever is less.			

Here are your choices—please check one:

- I CERTIFY that I NEVER buy anything which would require me to pay use tax. (we will enter \$0)
- I kept track and here is the total amount I spent on which I owe use tax: \$ _____
- I estimate that I bought \$ _____ worth of stuff on which I owe use tax.
- Please use the “safe harbor” chart at the left to figure my use tax. If you use the safe harbor, you must pay additional tax on any single item that cost \$1,000 or more.

Check here if you bought any one thing costing \$1,000 or more in a sales-tax-free situation.

Would you like to meet or talk with your preparer to go over your return? Yes No Not Sure

Do you have any questions or concerns?

Most states now request your driver's license or state id information to protect against someone else using your identity to get a refund. Please give us a copy of your license or ID or complete the following information:

License # _____ Issue date _____ Exp date: _____ State: _____

or I don't have a license or ID or prefer not to give the information.

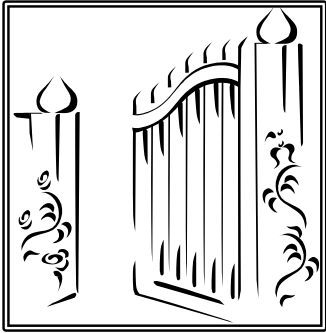


Signature _____ **Date** _____



Please note: If you are 18 years of age or older, we cannot give your parents any information about your return unless you authorize us to do so in writing.

If you need us to give your return or other information to your parents, please sign the Release/Authorization attached or available on our website: www.vermonttaxservices.com You may withdraw that authorization at any time by notifying us.



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Release/Authorization

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid.

If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Duration of consent (optional): 6 Months 1 Year 5 Years Other _____
(expires after a year unless you enter something else)

I, _____ authorize Business & Tax Consultants, Inc. to
Your Name

Purpose of Release: (check box and complete as necessary)

- 1. Allow my parents to pick up my tax materials.
- 2. Allow _____ to pick up my tax materials.
Other person's name
- 3. Give _____ my tax return.
- 4. Other _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

Taxpayer Signature: _____ Date: _____

If completing online, please type your name