

### Questionnaire

Please check the appropriate box and include all necessary details.

Name: \_\_\_\_\_ Your e-mail address if you use one \_\_\_\_\_

Phone Number(s) \_\_\_\_\_

### Personal Information

- Did you marry, divorce, separate or become widowed during the year? Yes  No  Not Sure
- Did your address change from last year? Yes  No  Not Sure
- New Address: \_\_\_\_\_ Date Moved: \_\_\_\_\_
- Did you or your spouse become blind or disabled during the year? Yes  No  Not Sure
- Is someone else supporting you—paying most of your bills? Yes  No  Not Sure
- Do you want to **change** the bank account where your refund is deposited? 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)

### Purchases, Sales and Debt Information

- Did you **buy or sell, any real estate** during the year? Yes  No  Not Sure
- Did you **sell stock** during the year (other than in a retirement acct)? Yes  No  Not Sure
- Did you **take out a home equity** or refinance your mortgage this year? Yes  No  Not Sure
- Did you **sell a business, rental, or other property** this year? Yes  No  Not Sure

### Income Information

- Do you have any income from hobbies or odd jobs? Yes  No  Not Sure
- Please check "Yes" or "Not Sure" if you:  
Sell produce or farm products (and you are not a farmer), 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: \_\_\_\_\_
- Did you win any prizes or money from bingo, lotteries, raffles or gambling? Yes  No  Not Sure
- Do you get paid for any work you did that you don't have a W-2 or 1099 for? Yes  No  Not Sure
- Did you have any foreign income or pay any foreign taxes during the year? Yes  No  Not Sure
- Did you receive any income from property sold prior to this year? Yes  No  Not Sure
- Did you receive Social Security Benefits? Yes  No  Not Sure
- If not, will you start this year? Yes  No  Not Sure
- Did you receive any payments from a pension or IRA? Yes  No  Not Sure
- Did you cash in any life insurance policies? Yes  No  Not Sure
- Did you cash any U.S. Savings bonds? Yes  No  Not Sure
- Do you rent out a home or RV through Airbnb or other such agencies? Yes  No  Not Sure

### Miscellaneous Information

- Did you receive or pay **Alimony**? I paid \$ \_\_\_\_\_ in 2017 or I received \$ \_\_\_\_\_ in 2017
- Did you give anyone more than \$14,000 (cash, real estate or other)? Yes  No  Not Sure
- Did you make any contributions to an education savings or 529 Plan? Yes  No  Not Sure
- Did you pay long-term (nursing) health care insurance premiums? Yes  No  Not Sure
- Did you install or purchase solar panels to produce electricity? Yes  No  Not Sure
- Please give us a copy of the contract/receipt

Have you ever lived or worked in, or were you born in, or do you have any connection with any **foreign countries** (including Canada) such as bank accounts, real estate owned, relatives or close friends living abroad, or any interest in a foreign bank account, corporation or partnership? Yes  No  Not Sure

**\*\*\*If “No” initial here: \_\_\_\_\_**

If you answered “Yes” or “Not Sure” please ask for the foreign interest questions.

### **Obamacare/Affordable Care Act**

Are you and your spouse (if you have one) on Medicare? Yes  No  Not Sure

You may or may not get a form 1095B. If you do, bring it. If not, as long as we can see on your Social Security form (with the pink boxes) that you paid premiums, that is good enough!

If you have medical insurance through the exchange (Vermont Health Connect or the Health Insurance Marketplace) you should get a 1095A. We need to have that to file your return.

If you have health insurance through an employer or the VA, please bring your 1095B or C.

Most states now request CURRENT driver’s license information to prevent someone else filing a tax return and claiming a refund in your name. If you have renewed your license since last year, give us a copy or write down your new issue date and expiration date here:

Taxpayer Issue date: \_\_\_\_\_ Exp date: \_\_\_\_\_ Spouse: Issue date: \_\_\_\_\_ Exp date: \_\_\_\_\_

#### **Information to keep in mind:**

- **The IRS will not contact you by phone or email. If you receive a phone call or email demanding money, ignore it. When in doubt, call us!**
- **If you are asked for additional information, it is helpful if you can bring/send it to us in one batch/email.**

**New Hampshire Residents Only: You are done!!!! Sign here.**



**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_



**Vermont and Massachusetts residents keep going. You have one more page!**

If you live in a state other than Vermont, Massachusetts or NH, tell us what state \_\_\_\_\_



# Vermont Residents Only

## Property Tax Assistance or Renter's Rebate:

1. If you live in a **rented** house or apartment and your income is (or might be) less than \$47,000 check this box  Make sure you give us your landlord certificate and go to **Household Income**, below.
2. If you **own** your Vermont home please give us a copy of your property tax bill, check this box  and go to **Household Income**, below.
3. If you know you don't qualify for either, check this box and go to **Use Tax** below.

### Household Income:

Please list everyone who lives or lived in your home at any time during 2017:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Include roommates (but not pets) and friends and family members even if they did not live with you all year.

Snow Birds: did you RENT OUT your VT home during 2017? Yes  No  Not Sure

Do you or any household members receive or pay child support? Yes  No  Not Sure

Did you or any household members receive any of the following: (check any that might apply) or NONE

- Veterans Benefits       Military allowance       Hobby income       Gifts over \$6500
- Workers Compensation       Welfare (not including food stamps or fuel assistance)       Lottery or other prize (of any amount)

IF YES, include statements or a copy of that person's tax return.

### Use Tax:

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.

USE TAX REPORTING TABLE FOR TAX YEAR 2017			
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.

If you are self-employed, and you bought anything in a sales-tax-free situation, check here

Would you like to contribute to any of the following (to be deducted from your refund or added tax due)?

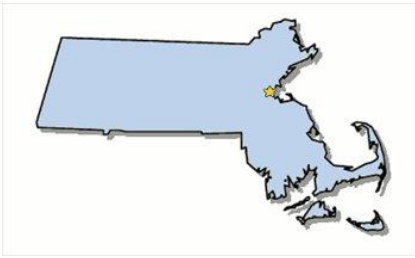
Green Up Vermont \$\_\_\_\_\_ Children's Trust Fund \$\_\_\_\_\_ Nongame Wildlife Fund \$\_\_\_\_\_ Vermont Veterans Fund \$\_\_\_\_\_



Signature \_\_\_\_\_

Date \_\_\_\_\_





# Massachusetts Residents Only

## Rent Credit:

Do you pay rent for your home? Yes  No  If yes, how much did you pay for rent for the year? \_\_\_\_\_  
 What is the name and address of your landlord(s) \_\_\_\_\_  
 Does anyone else (other than your immediate family) live with you? \_\_\_\_\_

## Use Tax:

Use tax is tax due on items you purchase without paying sale tax and then USE in Massachusetts. 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 Massachusetts customers but not all of their vendors do. (For more information about this ask your preparer or go to: <https://www.mass.gov/service-details/individual-use-tax>)

Mass AGI Per Return*	Use Tax liability
\$0 - \$25,000	\$0
\$25,001 - \$40,000	\$20
\$40,001 - \$60,000	\$31
\$60,001 - \$80,000	\$44
\$80,001 - \$100,000*	\$56

If the Massachusetts AGI per return\* is above \$100,000, multiply by .000625.

Here are your choices:

- 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 add 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.

If you are self-employed, and you bought anything in a sales-tax-free situation, check here

## Charitable Contributions:

Would you like to contribute to any of the following? (to be deducted from your refund or added tax due)

Organ Transplant Fund \$ \_\_\_\_\_ AIDS Fund \$ \_\_\_\_\_ US Olympic Fund \$ \_\_\_\_\_  
 Endangered Wildlife Fund \$ \_\_\_\_\_ Military Family Relief Fund \$ \_\_\_\_\_ Homeless Animal Care \$ \_\_\_\_\_



Signature \_\_\_\_\_ Date \_\_\_\_\_

