

Additional Questions:  
**Please check all that apply!**

Life Events

- Marital Status Changed
- Address Changed
- Email or Phone Number Changed
- Updated or New Driver's License
- New Bank Account Information for Direct Deposit
- Changes in Dependents
- Had a Baby
- Any of Your Dependent Children Collect Interest/Dividend Income/Sell Stock
- File Bankruptcy or have Cancellation of Debt
- Repayment of First Time Homebuyer Credit
- Adoption
- Are You Supporting a Parent?
- Did You Replace Your Business Vehicle?

Income

- New Full time or Part Time Job
- Bank Interest and/or Dividends/ Stock Sales/ Virtual Currency?
- Alimony Received or Paid
- Side Business Income (All Income, Even from Hobbies, Must Be Claimed)
- Unemployment Compensation
- Other Income: (Gambling, Lottery, Prizes, Awards, Jury Duty, Etc.)
- K-1's – Interest in A Partnership, Corporation, Royalties, Trusts or Estates
- Receive A Cancellation of Debt

Deductions

- Contribution to Retirement Account:
  - o IRA, Roth, Other
- Educational Expenses
  - o Tuition 1098-T
  - o Student Loan Interest
  - o Books and Other Deductible Expenses
  - o 529 Contributions – For A Deduction Plan Must Be a Colorado Plan!
- Health Savings Account Contributions or Distributions
- Make Long Term Care Insurance Payments
- Child Care Expenses
  - o Dependent Care Deducted through W-2?
- Make Estimated Payments Fed & State (Dates and Amounts)
- Buy, Sell, Refinanced, Foreclosed or Abandoned A Home or Rental Property
- Did You Open A New Home Equity Loan?
- Solar or Energy Efficient Property Improvements

New Clients

- Have Carryover Capital Losses from Previous Year
- State Refund or Owe from Previous Year
- Other Carryovers, Net Operation Loss, Excess Investment Interest, Etc.

**\*\*I/we have reviewed these changes and have reported any changes to my tax preparer.**

Sign: \_\_\_\_\_ Date: \_\_\_\_\_