

Taxpayer name: \_\_\_\_\_ Spouse name: \_\_\_\_\_  
 Date of birth: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
 SS number: \_\_\_\_\_ SS number: \_\_\_\_\_  
 Cell phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_  
 Work phone: \_\_\_\_\_ Work phone: \_\_\_\_\_  
 Email address: \_\_\_\_\_ Email address: \_\_\_\_\_  
 Home phone: \_\_\_\_\_ New dependent: \_\_\_\_\_ DOB: \_\_\_\_\_  
 SS number: \_\_\_\_\_

Mailing address:

«Taxpayer\_Name»  
 «Street\_Address»  
 «City», «State» «ZIP\_Code»

Health insurance coverage	Full-year	Part-year	None
Taxpayer			
Spouse			
Dependents			

If you are a Delaware resident, are you and/or your spouse an **active** member of a volunteer fire company? \_\_\_\_\_ Company # \_\_\_\_\_

If your tax return results in a refund, would you like to have it directly deposited into your bank accounts? \_\_\_\_\_

Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_

Account #: \_\_\_\_\_ Checking \_\_\_\_\_ or Savings \_\_\_\_\_

I wish to receive my tax return in the following format (charges are donated to National Multiple Sclerosis Society):

Paper \$5.00 \_\_\_\_\_ Portal \_\_\_\_\_ CD or Memory Stick supplied by me \_\_\_\_\_

	YES	NO	N/A
<b>Do you give Davis-Smith Accounting Associates permission to send invoices &amp; statements via email?</b>			
<b>Do you operate a <u>rental property</u> (see below), farm, LLC, business, partnership or corporation?</b>			
<b>Did you make any payments (\$600.00 or more) in 2019 that would require you to file form(s) 1099?</b>			
<b>If yes, did you or will you file ALL required forms 1099?</b>			
<b>Did you have employees?</b>			
<b>If yes,</b>			
<b>a. Did the business provide health insurance to the employees?</b>			
<b>b. Did you offer ANY type of benefits to your employees (health/dental/visions, life, etc)</b>			
<b>Did you make use of or have transactions in any form of alternative currency, such as Bitcoin, Amazon Coin, etc.?</b>			
<b>Did you have income from an on-line business (E-bay or Etsy) or income from Uber, Lyft or Airbnb?</b>			
<b>Did you have foreign bank account or have an interest in a foreign trust?</b> Please note: Penalties for failure to report foreign source income or ownership of a foreign account start at \$10,000.00 per violation.			
<b>IF YOU OWN RENTAL PROPERTY:</b>			
<b>On a regular basis (at least bi-weekly) &amp; continuous throughout the year, do you consult with advisors, property managers or personally visit the property?</b>			
<b>Is the activity conducted with a profit motive?</b>			
<b>Do you spend several hours regularly or bi-weekly dealing with the advisors, managers or personally with tenants, repair or maintenance companies or on-site issues?</b>			
<b>Do you maintain written calendar time records to prove the regular, substantial, continuous activity?</b>			

Signature: \_\_\_\_\_

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