



Please answer the following questions to assist with your return preparation for tax year 2019: (If you received a tax organizer packet in the mail from us and have already answered the questions in that packet, this form does not need to be completed.). Please note – if you are claiming head of household or credits such as child, dependent, education or EIC, additional questions will be asked.

- 1. If you would like to receive a financial consultation with ARGV, please schedule an appointment with the receptionist or call 270-990-9000 for more information.
2. Did your marital status change during the year?
3. Are you legally married?
4. Did your address change during the year?
5. Were there any changes in dependents from the prior year?
6. Owned foreign financial assets or have signature authority over a bank acct in a foreign country?
7. Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?
8. Sold stocks, securities, capital assets or real estate.
9. Retired or changed jobs in 2019 or expect to in 2020?
10. Received distributions from pensions, annuities & IRAs and/or Social Security benefits?
11. If you or spouse are over 70 1/2 and have money in an IRA or other retirement account, did you take out the required minimum distribution for 2019?
12. Other than through payroll deductions, did you make an IRA contribution?
13. Pay mortgage interest on your primary and/or secondary residence?
14. Paid college/post-secondary tuition expenses?
15. Paid childcare expenses?
16. Did you start a new business, purchase a new rental property, farm or acquire any new interest in any partnership or S corporation or did you sell or exchange any of these in 2019?
17. Did your business make any payments that would require filing Form(s) 1099?
18. Did you or your spouse make any cash or non-cash gifts with a total (aggregate) value in excess of \$15,000 to any individual during 2019?
19. Did you or spouse pay more than \$1,000 in a quarter or more than \$2,100 for the year for domestic services in or around your home to individuals who can be considered household employees?
20. Did you or your business have any debts canceled or forgiven during 2019?
21. Did you receive correspondence or were you notified by the IRS or other taxing authority during the year?
22. Have you or your spouse been a victim of identity theft and contacted the IRS?
23. Make any Internet, mail order, or other out-of-state purchases which you did not pay 6% or more sales tax?

(COMPLETE REVERSE SIDE)

