



Thank you for choosing AFP Consulting LLC for your tax preparation. The following questionnaire will be used in helping us to prepare your tax return. Should you have any questions when filling out this form, please do not hesitate to contact us.

*The following is a list of forms that if applicable need to be enclosed **with your questionnaire**. Please take a moment after you have completed your questionnaire to see if you have enclosed all the needed items for us to complete your tax return. Once you have completed this form please return it in the enclosed envelope or to the address listed above.*

Wage Slips

W2s (United States)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
T4s (Canada)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
Foreign Wage Slip (Issued by team)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
Team itineraries	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable

Enclosed

Bank Statements

1099-Int (Interest)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
1099-Div (Dividends)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
1099-B (Stock proceeds from sales)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
T3 or T5 *Canadian	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
Foreign Bank Statements (only if it exceeded \$10,000 US)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
• Foreign accounts I need account number & average balance for year	

State funds received from tax refunds to unemployment

1099-G (State tax refund)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
1099-G (Unemployment)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable

Higher Education

1098-E (Student loan interest)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
1098-T (Tuition)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable

Mortgage Interest & Taxes

1098 (Mortgage statement)	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
Property tax receipt	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable

Business or Employee Expenses

Receipts	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
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Health Coverage – Only for US citizens

1095 (A, B or C) or applicable statement	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
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Charitable Contributions

Receipts	<input type="checkbox"/> yes <input type="checkbox"/> no <input type="checkbox"/> not applicable
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