



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)
- T4s (Canada)
- Foreign Wage Slip (Issued by team)
- Team itineraries

Enclosed

- yes no not applicable
- yes no not applicable
- yes no not applicable
- yes no not applicable

Bank Statements

- 1099-Int (Interest)
- 1099-Div (Dividends)
- 1099-B (Stock proceeds from sales)
- T3 or T5 *Canadian
- Foreign Bank Statements (only if it exceeded \$10,000 US)

- yes no not applicable
- yes no not applicable
- yes no not applicable
- yes no not applicable
- yes no not applicable

- Foreign accounts I need account number & average balance for year

State funds received from tax refunds to unemployment

- 1099-G (Unemployment)

- yes no not applicable

Higher Education

- 1098-E (Student loan interest)
- 1098-T (Tuition)

- yes no not applicable
- yes no not applicable

Mortgage Interest & Taxes

- 1098 (Mortgage statement)
- Property tax receipt

- yes no not applicable
- yes no not applicable

Health Coverage – Only for US citizens

- 1095 (A, B or C) or applicable statement

- yes no not applicable

Charitable Contributions

- Receipts

- yes no not applicable

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