# 2019 Tax Information Worksheet

**DATE:**____________________________________

**Full Legal Name:**______________________________**Date of Birth**__________**SS#**__________________________

**Spouse:**____________________________________**Date of Birth**__________**SS#**__________________________

**Address:** __________________________________**City/State/Zip:**________________________________________

**Telephone # _(_______)**________________________**Cell#:_(________)**____________________________________

**Email address(s):**______________________________________________________________________________

**********How do you prefer we contact you? (Please Circle)   Home Phone   Cell Phone   Email   Text**

**Dependant's Name(s), SS # & Date(s) of Birth:**

- **1.**__________________________________**SS#**______________________**DOB:**______________________
- **2.**__________________________________**SS#**______________________**DOB:**______________________
- **3.**__________________________________**SS#**______________________**DOB:**______________________
- **4.**__________________________________**SS#**______________________**DOB:**______________________

**Bank Routing #:**__________________________________ **Account #:**________________________________________

**(If this is a new account, we will need a copy of a check from this account.)**

***Did you marry or divorce during the year 2019?**   **Yes or No**

***Were there any births or deaths during the year 2019?**   **Yes or No**

***Did you start or close a business during the year 2019?**   **Yes or No**

***Did you buy or sell any property during the year 2019?**   **Yes or No**

***Did you buy or sell any vehicles during the year 2019?**   **Yes or No**

***Were there any changes in dependant status from previous years?**   **Yes or No**

***Are there any returns that need to be filed for a dependent?**   **Yes or No**

## *****Did you make Estimated Tax Payments for 2019?*****   Yes or No

***If yes, fill in the dates & amounts paid: Date:***______________***$***__________________
***Date:***______________***$***__________________
***Date:***______________***$***__________________
***Date:***______________***$***__________________

**Did you have qualifying health insurance coverage for ALL of 2019 for YOURSELF, SPOUSE AND ANY DEPENDANTS that you *COULD HAVE* claimed?**   **Yes or No**
**Did your receive health insurance premium credit (From 1095A, B or C) for any part of 2019?**   **Yes or No**

*******If yes, did you include the forms related to the insurance credit?**   **Yes or No**

***Please Note: In the event you elect to file your tax return before you receive tax form 1095A, B or C from the insurance company and received a Health Insurance Tax Credit, your return may be required to be amended. This will be at an additional fee.***

**Do you prefer a paper copy or electronic copy of your tax return?** ☐ **PAPER** ☐ **ELECTRONIC**

Royce A. Belcher Certified Public Accountant
420 West Main Street • Lebanon, Tennessee 37087 • 615-444-1149 • Fax 615-444-0026

## 1099 QUESTIONS ON BUSINESS RETURNS

Generally, any trade or **business** that makes payments in the course of that trade or business of **interest, rents, compensations, remuneration for services, annuities, etc., aggregating $600 or more for the year to a single payee is required to report the payments to the IRS and to the recipient of the payments by filing Form 1099.** This reporting requirement *generally does not apply to payments to corporations*. However, the 1099 reporting requirements do apply to payments made to corporations for attorneys' fees, and to amounts paid to corporations providing medical or health care services. In addition, if a business makes a payment otherwise required to be reported on Form 1099, the payment is generally not required to be reported **if the payment is made using a credit card, a debit card, or a qualified third party payment network.**

A Form 1099 is required to be filed with the recipient of the payment and with the IRS by January 31 of the year following the year the payment is made.

The penalties for failing to file 1099's, or for filing 1099's late, are significant. The amount of the penalty is based on when you file. A penalty for failure to file a correct information return is separate from the penalty for failure to furnish the correct recipient statement. For example, if you fail to file a correct Form 1099 with the IRS and don't provide a correct Form 1099 statement to the recipient, you may be subject to two separate penalties. **Note!** The IRS may waive these penalties if you can show reasonable cause for failing to file the form. **Caution!** *If you intentionally fail to file Form 1099, then the penalties increase considerably per 1099.*

The IRS now includes two questions concerning Form 1099 on all business returns, including Form 1040, Schedule C, Schedule F, and Schedule E as well as Forms 1065, 1120, and 1120-S. The questions are **1)**"Did you make any payments in the filing year that would require you to file Form(s) 1099?", and **2)**"If 'Yes', did you or will you file all required Form(s) 1099?" We must answer these two questions when we prepare you Form 1040 if the 1040 includes a Schedule C, Schedule F, or Schedule E. In addition, we must answer these questions when preparing a Form 1065, 1120, or 1120-S. Therefore, if you have a trade or business, please review the above requirements for filing Forms 1099 and provide us with the answers to the following questions:

1. Did you make any payments in the last year that would require you to file Form(s) 1099? **Yes** **No**

2. If "Yes", did you or will you file all required Forms 1099? **Yes** **No**

**Please call us if you have any questions concerning the Form 1099 filing requirements. In addition, if you have not filed all required 1099s, we will help you meet your filing responsibilities.** However, unless you engage us to do so, we do not routinely file Forms 1099 as part of preparing your income tax returns.