

MANDATORY HEALTH INSURANCE & EDUCATION QUESTIONNAIRE

MANDATORY for due diligence reasons, **NEW CLIENTS** will need to give us a copy of **SOCIAL SECURITY CARD** and **BIRTH CERTIFICATES** for **EACH DEPENDENT**. For previous clients, we will need the same information for **NEW DEPENDENTS**.

	YES	NO
Did you have health insurance, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family?		
Were you covered for every month of the year?		
Please provide us with Form 1095.		
Did you get an Advanced Premium Tax Credit?		
Are you providing health insurance for someone who is not claimed on your return? (i.e. Divorced parents)		
Did you make any contributions or receive any distributions from a Health Savings Account (HSA) or Archer MSA? Please provide Form 5498-SA and Form 1099-SA. Please go online to print forms if necessary.		
Did you pay long-term care premiums for yourself or your family? Please provide amounts paid. _____		
Did you pay any COBRA health care coverage continuation premiums? Please provide amounts paid. _____		
Are you paying any portion of your health insurance? (including premiums taken from pension) Please bring in a paystub or other documentation.		
If you are a business owner, did you pay health insurance premiums for your employees?		
Did you, your spouse, or your dependents attend a post-secondary school during the year? Tuition statements and a 1098-T MUST BE PROVIDED. If you do not provide a 1098-T, you will not be able to claim the credit. The student has access to this form. Please make sure they get you a copy. Print the account history so that we have all charges and payments.		
Did you pay any student loan interest this year?		
Did you make any withdrawals from an education savings or 529 Plan account?		
Did you make any contributions to an education savings or 529 Plan account?		
Did you have a loss in your 529 accounts?		
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?		
Did you have any tuition, room and board expenses during the year?		
Did you pay any private K-12 tuition?		

IMPORTANT NOTE: Due to the new health care laws, we will be unable to complete and process your tax return until you have returned this information to us.