

Taxpayer name: _____ Spouse name: _____
 Date of birth: _____ Date of Birth: _____
 SS number: _____ SS number: _____
 Cell phone: _____ Cell phone: _____
 Work phone: _____ Work phone: _____
 Email address: _____ Email address: _____
 Home phone: _____ New dependent: _____
 SS number: _____

Mailing address: _____
 Street Address: _____
 City, State, Zip: _____

	Health insurance coverage	Full-year	Part-year	None
Taxpayer				
Spouse				
Dependents				

If you are a Delaware resident, are you and/or your spouse an **active** member of a volunteer fire company? _____ Company # _____

If your tax return results in a refund, would you like to have it directly deposited into your bank accounts? _____

Bank Name: _____ Routing #: _____

Account #: _____ Checking _____ or Savings _____

I wish to receive my tax return in the following format (charges are donated to National Multiple Sclerosis Society):

Paper \$5.00 _____ Portal _____ My CD _____

	YES	NO	N/A
Do you give Davis-Smith Accounting Associates permission to send invoices & statements via email?			
Do you operate a <u>rental property</u> (see below), farm, LLC, business, partnership or corporation?			
Did you make any payments (\$600.00 or more) in 2018 that would require you to file form(s) 1099?			
If yes, did you or will you file ALL required forms 1099?			
Did you have employees?			
If yes,			
a. Did the business provide health insurance to the employees?			
b. Did you offer ANY type of benefits to your employees (health/dental/visions, life, etc)			
Did you have income from an on-line business (E-bay or Etsy) or income from Uber, Lyft or Airbnb?			
Did you have foreign bank account or have an interest in a foreign trust? Please note: Penalties for failure to report foreign source income or ownership of a foreign account start at \$10,000.00 per violation.			
IF YOU OWN RENTAL PROPERTY:			
On a regular basis (at least bi-weekly) do you consult with advisors, property managers or personally visit the property?			
Does this activity continue throughout the year?			
Do you spend several hours regularly or bi-weekly dealing with the advisors, managers or personally with tenants, repair or maintenance companies or on-site issues?			
Do you maintain written calendar time records to prove the regular, substantial, continuous activity?			

Signature: _____

Date: _____