



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**

**Enclosed**

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

**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

**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
----------	------------------------------	-----------------------------	---

**Should you have any questions as you complete this form please do not hesitate to contact us for help.**

**AFP CONSULTING LLC**  
 1453 Lawrence Road  
 Hilton, NY 14468  
 (585) 705-3405  
[www.afpconsultingllc.com](http://www.afpconsultingllc.com)