

2019 MISCELLANEOUS INFORMATION

TAXPAYER(S):

Infinity Wealth Management, Inc. D/B/A Infinity Tax Advisors strongly encourages all clients to diligently complete this information collecting form in an effort to ensure that all relevant data is collected. It is the taxpayer's responsibility to provide complete and accurate information. Please indicate your understanding by signing and dating herein.

SIGNATURE:

DATE:

Personal/Dependent Information

Yes	No	Did your marital status change during the year? If "Yes," explain:
Yes	No	Did your address change during the year? Provide Driver's License or State ID.
Yes	No	Did you complete the Due Diligence Verification Document to substantiate dependent related credits? REQUIRED
Yes	No	Did you have any change in dependents during the year? If "Yes," explain:
Yes	No	Did you have any childcare or adoption expenses during the year? If "Yes," provide details.
Yes	No	Did you have any children under age 19 or a full-time student under age 24 with more than \$2200 of unearned income?

Health Care Information

Yes	No	Did any member of your household have healthcare coverage through the Marketplace? If so, please provide copy of Form 1095-A.
Yes	No	Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Income, Purchases, Sales, and Debt Information

Yes	No	Did you receive any tips not reported to your employer?
Yes	No	Did you receive any disability income during the year?
Yes	No	Did you cash any US savings bonds during the year?
Yes	No	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies?
Yes	No	Did you receive income or incur expenses associated with a fantasy sport league?
Yes	No	Did you receive income or incur expenses associated with car sharing (ex Lyft or Uber)?
Yes	No	Did you receive income or incur expenses associated with freelancing (ex Upwork or TaskRabbit)?
Yes	No	Did you receive income or incur expenses associated with fashion sharing (ex Poshmark or ThredUP)?
Yes	No	Did you receive income or incur expenses associated with crowdfunding (ex Kickstarter or Indiegogo)?
Yes	No	Did you receive income or incur expenses associated with a short-term rental (ex Airbnb or HomeAway)?
Yes	No	Did you rent out your home or use it for business?
Yes	No	Did you buy or sell any stocks, bonds, or other investments during the year?
Yes	No	Did you receive any other income not indicated herein?
Yes	No	Did you acquire new or additional interest in a partnership or S corporation?
Yes	No	Did you have any debts cxld or forgiven this year or does anyone owe you money that has become uncollectible?
Yes	No	Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle or make energy-efficient improvements to your home during the year?

Itemized Deduction Information

Yes	No	Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
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Itemized Deduction Information (continued)		
Yes	No	Did you pay long-term care premiums for yourself, your spouse, or a dependent during the year?
Yes	No	Did you receive any state or local income tax refunds from prior years?
Yes	No	Did you make any major purchases (vehicle, boat, etc.) during the year?
Yes	No	Did you pay any real estate property taxes or personal taxes during the year?
Yes	No	Did you pay mortgage interest during the year?
Yes	No	Did you make cash donations to charity during the year?
Yes	No	Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
Yes	No	Did you donate a boat or vehicle during the year to a non-profit? If "Yes", attach form 1098-C.
Yes	No	Did you have gambling winnings or losses that offset winnings during the year?
Retirement Information		
Yes	No	Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?
Yes	No	Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), myRA, or other qualified retirement plan during the year?
Yes	No	Did you receive any Social Security benefits during the year?
Education Expenses		
Yes	No	Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
Yes	No	Did anyone in your household attend a post-secondary school during the year?
Yes	No	Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
Yes	No	Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?
Miscellaneous Information		
Yes	No	Did you incur a gain or loss due to damaged or stolen property?
Yes	No	Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
Yes	No	Did you make gifts to any one person in excess of \$15,000 during the year?
Yes	No	Did you incur moving expenses related to a military service transfer during the year?
Yes	No	Are you a business owner who paid health insurance premiums for your employees during the year?
Yes	No	Did you apply an overpayment of your 2018 taxes to your 2019 estimated taxes?
Yes	No	If you have an overpayment of 2019 taxes, do you want the refund applied to your 2020 estimated taxes?
Yes	No	Did you make any estimated payments toward your 2019 taxes? If "Yes," provide written details.
Yes	No	Do you want to have any refund directly deposited into your bank account? If "Yes," provide canceled check.
Foreign Account Information		
Yes	No	Did you have a financial interest in/or signature authority over a financial a/c asset located in a foreign country?
Yes	No	Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
Yes	No	Did you own property in a foreign country?
Yes	No	Did you have any income from, or pay taxes to, a foreign country outside of your brokerage accounts?
Yes	No	Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?