

2019 Additional Tax Info Questionnaire

MORTGAGE

N/A YES NO

If your mortgage was over \$1million, was it originated or in contract prior to December 15th 2017?

N/A YES NO

Has your mortgage ever been refinanced?

N/A YES NO

Did you receive money from the refinance?

If yes, what was the money used for?

Used to buy, build, or substantially improve a main or second home

Personal (Pay Off Credit Cards, Purchase Vehicle, etc.)

Education

If the money was used for more than one thing, please provide a breakdown:

N/A YES NO

Do you have a Home Equity Line of Credit?

If yes, what was the money used for?

Used to buy, build, or substantially improve a main or second home

Personal (Pay Off Credit Cards, Purchase Vehicle, etc.)

Education

If the money was used for more than one thing, please provide a breakdown:

DEPENDENTS

N/A YES NO

Did you welcome a baby or adopted child during 2019?

If yes, please provide documentation.

VETERANS EXEMPTION (NJ):

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Were you honorable discharged or released from active duty in the Armed Forces, Reserves, or National Guard on the last day of the tax year?

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If yes, have you been certified by NJ for the personal exemption?
Please include the tax certification with your tax documents.

If no, those seeking to claim the personal exemption must be certified that they are exempt before filing their NJ income tax return by mailing, faxing or uploading secure documentation. Examples of certifying documentation are: Form DD-214, Form DD-256 or Driver's License with Veterans Status. You will only need to be certified once.

More information about qualifying can be found on the Division of Taxation's website:

<http://www.state.nj.us/treasury/taxation/military/vetexemption.shtml>

QUALIFIED CAREGIVER OF VETERAN (NJ)

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are you a qualified family caregiver of a discharged veteran?

If yes, please provide documentation.

GOLD STAR FAMILY COUNSELING CREDIT (NJ)

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are you a member of the Gold Star Family Counseling Program?

If yes, please provide documentation.

YEAR-END PAY STUB

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you included your last pay stub (12/31/19) for each job held in 2019?

Please include the final pay stub with your tax documentation.

PROPERTY TAXES

N/A	YES	NO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Did you receive a Property Tax Reimbursement during 2019?

If so, for what year was the reimbursement? _____

How much was the reimbursement? _____

Please include documentation.

ENERGY CREDIT

N/A YES NO

Did you make a renewable energy or energy efficient upgrade to your home in 2018 to 2019?

If yes, what was the upgrade? _____

HEALTH INSURANCE (NJ)

N/A YES NO

Did you have health insurance in 2019?

If yes, was it through the Marketplace Exchange?

Yes

No

****Beginning January 1, 2019, NJ will require its residents to maintain health insurance. The law requires you and your family to have minimum essential health coverage throughout 2019 and beyond unless you qualify for an exemption.**

ESTIMATED TAX PAYMENTS

N/A YES NO

Did you make Federal or State estimated tax payments for 2019?

If so, please provide amounts below.

IRS	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	TOTAL
State: *	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	TOTAL

*Specify State if NOT New Jersey:

NJ SALES TAX

N/A YES NO

Did you buy taxable items without paying NJ Sales Tax?

This includes orders over the internet, by mail, or by phone on which you did not pay NJ Sales tax. This also includes out-of-state purchases on which you paid tax at a rate less than 6.625%.

If no, I certify that no Use Tax is due.

SIGNATURE: _____

DATE: _____