

Healthcare Coverage Questionnaire

Due to the Affordable Care Act (Obamacare), almost all U.S. citizens and legal residents (and their dependents) will be required to have health insurance for the entire year (starting on **January 1, 2014**). There is a tax penalty for not having health insurance during 2014 and beyond. There are very few exceptions to this requirement. We are requiring all of our clients to fill out this short form for this year, to complete our due diligence requirements.

1. Did you and your dependents have healthcare coverage for the full year?

Yes No

Employer provided / Private Insurance / Health Insurance Exchange (please circle one)

2. Did you receive any of the following IRS Documents? Forms 1095A, 1095B or 1095C.

If so, please attach.

3. If you or your dependents did not have healthcare coverage during the year, please call prior to your appointment so we can assist you in getting the documentation you'll need to file with your tax return. If you received an exemption certificate, please attach.

Taxpayer Printed Name: _____

Taxpayer Signature: _____

Spouse Printed Name: _____

Spouse Signature: _____

Date: _____

Virtual ACH / Credit Card Authorization Form

Client Name _____ Date _____

ACH:

Account # _____

Routing # _____

Bank Name _____

Account Type (Checking/Savings/Other) _____

Account Holder Name _____

-OR-

Credit Card:

__ VISA / __ MC / __ DISC / __ AMEX

Card Holder's Name _____

Card # _____

Exp Date _____ CCV _____ Zip _____

Email Receipt to _____

Signature _____

GPIT Use Only

Date Charged _____ by _____ Amount _____

Ask about our discounts!

We specialize in small business & work related deductions. Don't go to the big box places and do a generic return. We ask the questions needed to ensure that you get your maximum refund.

We are licensed and bonded, as required by the IRS and the Franchise Tax Board. You can look up our enrolled agent status at

<https://irs.treasury.gov/rpo/rpo.jsf>

You've got problems... We've got solutions.



Owned and operated by a licensed Enrolled Agent

We have been in business since 2003, and have over 20 years of accounting experience

We offer professional tax preparation in a private setting.

We offer a 10% discount for anyone that you refer and have thank you contests each year.

We offer evening and weekend appointments.

What we Offer:

**Income Tax Preparation*

**Income Tax Planning*

**Help with Tax Problems*

**Offers in Compromise*

**Installment Agreements*

**Penalty Abatement*

**Personal Financial Planning*

**Budget Preparation & Maintenance*

Greener Pastures Income Tax

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Mill Creek

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and Laser Center

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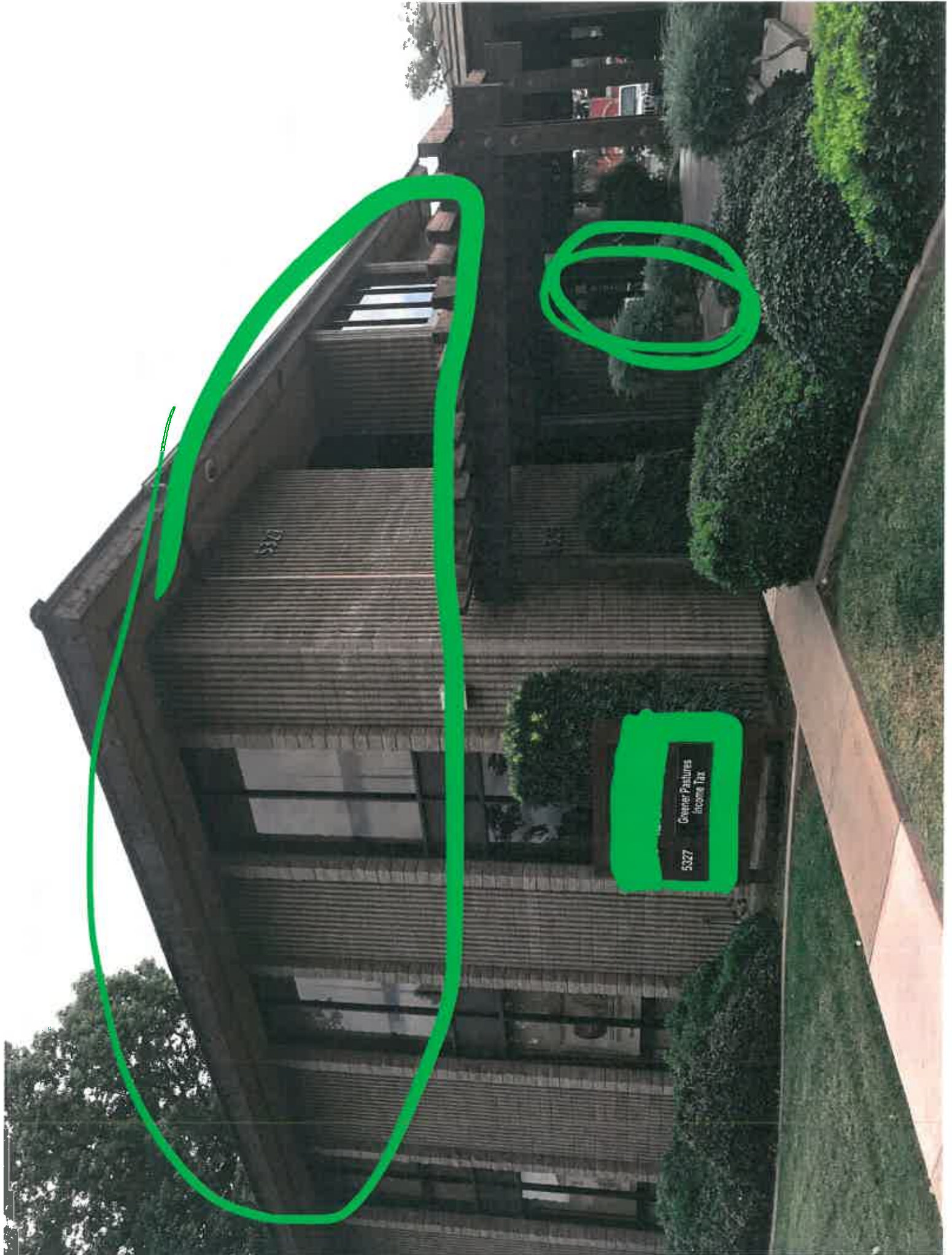
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Highway 198

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Sinus Center

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5327 Greater Features
Income Tax

