

## 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: \_\_\_\_\_