

## Questions

Please check the appropriate box and include all necessary details.

	Yes	No
<b>Personal Information</b>		
Did your marital status change during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
Did your address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, provide: _____		
Have any of your phone numbers changed?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, provide: _____		
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you change any bank accounts that have been used to direct deposit funds from the IRS or other taxing authority during the tax year?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Dependent Information</b>		
Did you claim a dependent last year that you cannot claim this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, give name: _____		
Do you have any new dependents that can be claimed on your tax return?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, provide name, social security number, and birth date: _____		
Did you pay for child care while you worked?	<input type="checkbox"/>	<input type="checkbox"/>
If yes provide day care provider name, address, amount, and federal identification number		
Did you pay any expenses related to the adoption of a child during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes provide amount: _____		
<b>Purchases, Sales and Debt Information</b>		
Did you start a new business or purchase rental property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, provided closing documents (HUD statements)		
Did you acquire or dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, include the HUD statement		
Did you refinance a principal residence or second home this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, include the HUD statement		
Did you sell an existing business, rental, or other property this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, include the HUD statement or closing documents		
Did you incur any non-business bad debts this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a new hybrid or alternative motor vehicle this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, include car purchase agreement from dealer		
Did you pay any student loan interest this year?	<input type="checkbox"/>	<input type="checkbox"/>
<b>Income Information</b>		
Did you have any foreign income or pay any foreign taxes during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a foreign bank account at any time during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, list on a seperate sheet		
Did you receive any income from property sold prior to this year?	<input type="checkbox"/>	<input type="checkbox"/>

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- Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?
- Did you make any withdrawals from an IRA, Keogh, SIMPLE, or SEP account?
- Did you make any withdrawals/contributions from/to a retirement plan (including IRA) due to Midwestern Disaster area relief?
- Did you make any withdrawals or contributions from an education savings or 529 Plan account?
- If yes, provide contributions or withdrawals \_\_\_\_\_
- Did you receive any distributions from a health savings account (HSA), Archer MSA, or Medicare Advantage (MSA) this year?
- Did you receive any disability income during the year?
- Did you receive tip income not reported to your employer this year?
- Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

**Itemized Deduction Information**

- Did you incur a casualty or theft loss during the year?
- Do you have evidence to substantiate charitable contributions?
- Did you make any noncash charitable contributions (clothes, furniture, vehicles,etc.)?
- Did you use your car on the job, for other than commuting?
- Did you work out of town for part of the year?
- Did you have any educational expenses?
- Did you have any expenses related to seeking a new job during the year?
- Did you make any major purchases during the year (cars, boats, etc.)?
- If yes, indicate item and costs" \_\_\_\_\_
- Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?

**Miscellaneous Information**

- Did you make gifts of more than \$12,000 to any individual?
- Did you pay long-term health care premiums for yourself or your family?
- If yes, provide amount: \_\_\_\_\_
- Did you engage in any bartering transactions?
- Did you contribute to a traditional IRA Account?
- If yes, provide amount: \_\_\_\_\_
- Did you contribute to a ROTH IRA Account?
- If yes, provide amount: \_\_\_\_\_
- Did you contribute to a nondeductible IRA Account?
- If yes, provide amount: \_\_\_\_\_
- Did you incur moving costs because of a job change?
- If yes, provide costs on a seperate sheet of paper.
- Did you, your spouse, or your dependents attend a post-secondary school during the year?
- Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?
- Did you receive correspondence from the State or the Internal Revenue Service?
- If yes, provide: \_\_\_\_\_
- Did you receive an economic stimulus (tax rebate) payment from the IRS?
- Did you pay any real estate property taxes this year?
- If yes, provide amount: \_\_\_\_\_
- Are you an educator? (teacher or administrator K - 12 only)
- If yes, provide educator expenses \_\_\_\_\_
- Are you legally blind?