

2010 Individual Tax Questionnaire

Please answer the following questions. If you are not sure of the answer, leave it blank and we can discuss it. **If you don't return this questionnaire with your tax information, we will assume that the answers to these questions are "No."**

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Are there any errors in the personal and dependent information that you have not corrected? Please provide or verify everyone's <u>date of birth</u>. |
| <input type="checkbox"/> | <input type="checkbox"/> | Will any dependent you claimed on your last tax return claim themselves or be claimed by someone else on this year's return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse elect to receive COBRA continuation health coverage (35% of premium) as a result of an involuntary termination? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any out of state purchases (including online purchases) and not pay sales tax? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you a resident of, or did you earn income in, more than one state ? If yes, you may be required to file tax returns in those states. Which state tax returns would you like us to prepare? _____
or Please Advise |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any real estate or other investment property other than through a stock brokerage account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did any <u>dependent child between 19 and 23 years of age attend school less than 5 months</u> during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did any <u>child under the age of 24, regardless of whether they are your dependent, have income (other than wages) of \$950</u> or more? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any <u>household employees</u> ? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any gifts directly or in trust, <u>exceeding \$13,000</u> per person? If yes, you may be required to file a gift tax return, even if no gift tax is due. |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you expect a <u>large fluctuation in your income</u> , deductions or withholding next year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you aware of any changes to your income, deductions and credits reported <u>on a prior year's return(s)</u> ? If yes, you may be required to file an amended return. |

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Miscellaneous Questions

Has the IRS, or any state or local taxing agency, **notified you of changes to a prior year's** tax return? If you have not done so already, please provide a copy of all notices received, and any reply you sent.

Are you aware of any items of income which is neither shown on an official tax reporting form nor noted elsewhere in the tax information you are providing to us?

Your answers to these questions may not change your tax, but are required to be reported:

Yes

No

Did you have any interest in, or signature or other authority over, a bank, securities, or other **financial account in a foreign country**?

Did you receive a distribution from, or were you the grantor, of or transferor to, a **foreign trust**?

Did you have a **medical savings account (MSA)** or health **savings account (HSA)**?

Did you roll over any distribution from a 401(k), pension, profit-sharing, or retirement plan, or Individual Retirement Account (IRA)?

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?

Have you already made or will you make a 2010 IRA Contribution? Roth IRA \$ _____ Deductible IRA \$ _____ Non-Deductible IRA \$ _____

Answering Yes to these questions may reduce your tax:

Yes

No

Did you pay to license, tag, or register a **boat** you own?

Did you purchase a new **hybrid** vehicle?

Did you purchase **certified energy efficient** home improvements?

Did you have **foreign income** or pay any foreign taxes?

Did you **work out of town** for part of the year?

Do you have any **worthless securities or any loans** that became uncollectible?

Did anyone pay post-secondary **college, trade school, or graduate school** **tuition** expenses for you or your dependents?

Did you purchase, sell or **refinance your principal home**, second home, or any other real estate, or did you take a home equity loan?

Did you **contribute money to a political party**, or candidate for political office? If so, how much? _____ Do not include political contributions in your charitable contribution totals.

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Miscellaneous Questions

Did you make any **charitable contributions of "stuff"** (anything other than cash, check, credit card, or unused items purchased on behalf of the charity)? If so, how much? _____ Please provide receipts if your total for the year is \$500 or more.

If you would like to contribute to the Presidential Campaign Fund or a charitable fund:

Yes

No

Do you wish to have \$3 (or \$6 on joint return) of your taxes applied to the Presidential Campaign Fund?

Do you wish to contribute to any state funds? *Contributions will **reduce your refund** by the amount you specify, and will count as a charitable contribution on next year's return.*