

"What To Do To get Ready" Questionnaire
If answers are "yes," bring documents

Yes No
Filing Status

1. Are you married?
2. Were there any births, adoptions, or deaths in your immediate family? (Provide social security card, birth date, or death certificate)
3. Can you be claimed as a dependent on another person's tax return?
4. Are any of your unmarried children who may be claimed as dependents, 19 years or older?
5. Are you or your spouse legally blind?

Income

6. Did you have wages? (Bring W-2's) Combat Pay?
7. Do you have children (under age 19 or college students under age 24 who did not support themselves) with unearned income in excess of \$1,900? (Provide documents)
8. Did you or your spouse receive social security payments? (Provide annual social security statement)
9. Did you receive non taxable interest? If yes, provide documents.
10. Did you or your spouse receive disability/tax exempt income during the year? If yes, how much \$_____.
11. Did you have other sources of income: interest, dividend, unemployment, sick pay, alimony, lottery, scholarships, bartering, other income not listed in the worksheets?
12. Did you sell stock, bonds, or other investment property or exercise any stock options during the year? (List the description, date acquired, date sold, sales price, cost or basis, and expense of sale)
13. Did you purchase, sell or refinance your principal home or second home, or make a home equity loan during the year? (Provide closing documents)
14. Did you receive the First-Time Homebuyer Credit on your 2008 tax return?
15. Did you purchase a principal residence between 4/09/08 and 05/01/10?
16. If yes to question 15, have you owned a home within the past 3 year?
17. Did you purchased a new principal resident after 11/06/09 and before 04/30/10 and lived in your prior home for 5 consecutive years out of the last 8 years?
18. Did you receive income or loss from a partnership & S-corporation? (Provide K-1's with instructions)
19. Did you have interest in a foreign bank account, an authorized signature holder, were you a grantor or transferor to a foreign trust?
20. Did you receive a gift in excess of \$14,139 from a foreign person?
21. Does anyone owe you money that has become uncollectible? If yes, how much \$_____.
22. Did you forfeit interest from early withdrawal of a Certificate of Deposit (CD)?
23. Did you file bankruptcy, have a foreclosure, or debt forgiveness? (Provide documents)

Business

24. Did you have a business? (Provide gross income and expenses, total business mileage from required log, cost of goods (if applicable))
25. Is the business licensed with the state? Does a B & O tax return need to be completed?
26. Did you purchase any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any assets to business use? (List the description, related business/activity, date placed in service and cost of basis. Provide HUD Report for real estate purchases)
27. Did you dispose of any business assets (including real estate)? (List the description, date sold, sales price, cost basis, and expenses of sale. Provide HUD Report for sale of real estate)
28. Did you use your vehicle for business? (Provide required mileage logs)

Rental

29. Do you have rentals? (Provide rental income and expenses, required mileage log associated with supporting the rental, cost and dates of major improvements)

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Yes No

Retirement

30. Did you or your spouse make contributions to a Profit Sharing, IRA (Individual Retirement Arrangement) or ROTH IRA? (Provide documents)
31. Did you or your spouse receive distributions from a Profit Sharing, IRA (Individual Retirement Arrangement) or ROTH IRA? (Provide 1099R)

Note: No minimum distribution from the IRAs required for 2009.

32. Did you or your spouse "roll over" a profit sharing or retirement plan distribution into another plan? (Provide Form 1099R)
33. Did you recharacterize any IRAs this year?
34. Did you transfer directly out of your IRA to a qualified Charitable Organization? (Must be 70 1/2)

Schedule A

35. Do you have medical expense or medical miles? (Bring required mileage log)
36. Do you own a home and don't itemize? If yes, how much property tax was paid? \$ _____.
37. Will you use the standard Sales Tax deduction plus sales tax paid on a vehicle, motor home, boat, aircraft and home improvements? If no, provide actual Sales Tax paid in 2009?
38. Did you purchase a new vehicle after 02/16/09 and 01/01/10? If yes, provide purchase documents
39. Did you use your vehicle on the job (other than to and from work)? (Provide required mileage logs and/or instructions from your employer)
40. Did you or your spouse work out of town for part of the year? (Provide documents)
41. Did you have a casualty loss, stolen property or a federally declared disaster casualty loss? (Provide a list showing the date of the event, a list of items with the original cost and value on the date of loss, the insurance reimbursement and police report)
42. Did you make a donation to a qualified Charitable Organization? (Provide documents to show support)
43. Did you move because of a job change? Did you have any job-seeking expenses?

Other

44. Was a gift made in 2009 of more than \$13,000 to any one individual?
45. Did you contribute to a HSA plan? If yes, how much \$ _____.
46. Did you pay for tuition for yourself, spouse and/or any dependents? (Provide 1099T and records of school costs)
47. Did you receive a distribution from an education account or a qualified tuition program?
48. Did you pay interest on education loans for yourself, spouse and/or dependents? (Provide documents)
49. Did you pay a household employee (Nanny) cash wages of \$1,700 or more in 2009; withhold federal income tax during 2009 at the request of a household employee? (Provide documents)
50. Did you have a child or dependent care expense to enable you to work or attend school full time? (Provide a list of providers, their SSN's or EIN's, name, address, and amount paid)
51. Did you purchase an alternative motor vehicle (energy efficient) or a qualified electric drive motor vehicle in 2009?
52. Did you install any qualified energy improvements, such as energy efficient windows, doors, metal roofs, heat pumps, water heaters, air conditioning, furnace and insulation?
53. Did you install any energy efficient materials in 2009 such as solar water heating, photovoltaic property, qualified fuel cell?
54. Did you receive a personal correspondence from the IRS or were you audited in 2009?
55. Did you pay estimated tax? (Provide documents)
56. Did you receive an Economic Recovery Payment in 2009 from social security benefits, supplemental security income or pension benefits?
57. Are you expecting a refund? (Provide a cancel check/savings slip for direct deposit information)
58. Can we contact you by E-Mail? Email address: _____