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

Yes	No	
☐	☐	1. Are you married?
☐	☐	2. Were there any changes to your dependants ie. living situations, births, adoptions, or deaths? (Provide social security card and date of birth, 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).
☐	☐	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 disability/tax exempt income during the year? If yes, how much $__________.
☐	☐	9. Did you have other sources of income: *interest, non taxable interest, interest from a foreign bank account, *dividend, *income or loss from a partnership & S-corporation (provide K-1's with instructions), *foreign trust, * unemployment,* social security payments, *sick pay, *alimony, *lottery, *gambling, *scholarships, *bartering, *other income not listed?
☐	☐	10. 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)
☐	☐	11. Did you file bankruptcy, have a foreclosure, or debt forgiveness? (Provide documents)

Retirement

☐	☐	12. Did you or your spouse make contributions, receive distributions and/or recharacterize from a Profit Sharing, Traditional IRA or ROTH IRA? (Provide 1099R)
☐	☐	13. Did you or your spouse "rollover" a profit sharing or retirement plan distribution into another plan? (Provide Form 1099R)
☐	☐	14. Did you or your spouse transfer directly out of your IRA to a qualified Charitable Organization? (Must be 70 1/2)

Business

☐	☐	15. Do you have a business? (Provide gross income and expenses)
☐	☐	16. Is the business licensed with Department of Revenue? Does a B & O tax return need to be completed?
☐	☐	17. Did you purchase or dispose of 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)
☐	☐	18. Did you use your vehicle for business? **(Provide documents to show support)**

Rental

☐	☐	19. Do you have rentals? (Provide rental income and expenses, required mileage log associated with supporting the rental, cost and dates of improvements and/or appliances purchased.)

Home Purchase

☐	☐	20. Did you receive the First-Time Homebuyer Credit on your 2008, 2009 or 2010 tax return?
☐	☐	21. Are you still residing in the home in which the First-Time Homebuyer credit was received?
☐	☐	22. Do you need to repay the 2008 First-Time Homebuyer credit?

Yes No

Schedule A

☐ ☐ 23. Do you have medical expense or medical miles? (Bring required mileage log)

☐ ☐ 24. 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 2011?

☐ ☐ 25. 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)

☐ ☐ 26. Did you make a donation to a qualified Charitable Organization? **(Provide documents to show support)**

☐ ☐ 27. Did you use your vehicle on the job (other than to and from work)? (Provide required mileage logs and/or instructions from your employer)

☐ ☐ 28. Did you or your spouse work out of town or out of county for part of the year? (Provide documents)

☐ ☐ 29. Did you move because of a job change?

☐ ☐ 30. Do you have any job-seeking expenses?

Other

☐ ☐ 31. Does anyone owe you money that has become uncollectible? If yes, how much $____________. (Provide documents)

☐ ☐ 32. Did you purchase, sell or refinance your principal home or second home, or make a home equity loan during the year? (Provide closing documents)

☐ ☐ 33. Did you give a gift greater then $13,000 to any one individual in 2011?

☐ ☐ 34. Did you contribute to a HSA plan? (Provide Form 8498-SA).

☐ ☐ 35. Did you pay for tuition for yourself, spouse and/or any dependents? (Provide 1099T and records of school costs)

☐ ☐ 36. Did you receive a distribution from an education account or a qualified tuition program?

☐ ☐ 37. Did you pay interest on education loans for yourself, spouse and/or dependents? (Provide documents)

☐ ☐ 38. Did you pay a household employee wages of $1,700 or more in 2011; withhold federal income tax during 2011 at the request of a household employee? (Provide documents)

☐ ☐ 39. Did you have child or dependent care expenses that enables you to work or attend school full time? (Provide a list of providers, their SSN's or EIN's, name, address, and amount paid)

☐ ☐ 40. Did you purchase a qualified fuel cell or electric drive motor vehicle in 2011?

☐ ☐ 41. Did you install any qualified energy improvements, such as energy efficient windows, doors, metal roofs, heat pumps, water heaters, air conditioning, furnace and insulation?

☐ ☐ 42. Did you install any energy efficient materials in 2011 such as solar water heating, photovoltaic property, qualified fuel cell?

☐ ☐ 43. Did you receive a personal correspondence from the IRS or were you audited in 2011?

☐ ☐ 44. Did you pay estimated tax? (Provide documents)

☐ ☐ 45. Are you expecting a refund? (Provide a cancel check/savings slip for direct deposit information)

☐ ☐ 46. Can we contact you by E-Mail? Email address:____