

Yes

Individual Income Tax Return for Tax Year 2009 or \_\_\_\_\_

Check box if YES. If answer is NO or not applicable, leave blank.

- 1 [ ] Will ALL income be reported to the tax preparer, taxable or not?
- 2 [ ] Do you prefer receiving your return copy, and next year's organizer, by e-mail?
- 3 [ ] Has your address, e-mail, phone or bank account changed? If moved, date? \_\_\_\_\_
- 4 [ ] If you need this return by a specific date, provide date & reason. \_\_\_\_\_
- 5 [ ] Are you waiting on any Form W-2's, 1099's, or K-1's?
- 6 [ ] Do you want us to prepare any state or franchise tax returns? Which states? \_\_\_\_\_
- 7 [ ] Has an extension been filed? If so, enter amount paid, if any \_\_\_\_\_
- 8 [ ] Has IRS or a state corrected or audited a return since we last met?
- 9 [ ] If married, were you separated from your spouse from July to December?
- 10 [ ] Can anyone claim you as a dependent on their return?
- 11 [ ] Have you ever declared bankruptcy or filed IRS Form 982? If yes, what year? \_\_\_\_\_
- 12 [ ] Do you own or have signature authority on a FOREIGN bank or investment account?  
Are you the beneficiary of a FOREIGN trust, FOREIGN estate, or FOREIGN gift?
- 13 [ ] Do you participate in or receive any retirement from a foreign country?
- 14 [ ] Did you receive or make gifts over \$13,000 to any one person?
- 15 [ ] Did you do any bartering or trading, or belong to a barter club?
- 16 [ ] Did you pay anyone more than \$1700 to work in your home (housekeeper, sitter)?
- 17 [ ] Were there any births, adoptions, marriages, divorces, or deaths in your household during the year? Were there any changes in dependents from the prior year? Have any dependents filed their own return? (If yes, provide a copy).
- 18 [ ] Does anyone reside with you that you are not claiming as a spouse or dependent?
- 19 [ ] Do you have a dependent child under age 24 with investment income over \$950?
- 20 [ ] Do you have a home equity loan, or a loan on an RV or boat? If yes, over \$100K?
- 21 [ ] Did you borrow or loan over \$10,000 to a relative or your business?
- 22 [ ] Do you have any BUSINESS loans guaranteed or co-signed by someone else?
- 23 [ ] Do you rent or lease any property to relatives, your corporation or partnership?
- 24 [ ] Did you start a new business, buy a rental, or buy into a partnership this year?
- 25 [ ] Did you sell, trade, or cease using any assets on your Schedule C or F business?
- 26 [ ] Did the percentage of business use change for any assets, except cars?
- 27 [ ] Did you have any debt refinanced, canceled, forgiven or restructured? Year? \_\_\_\_\_
- 28 [ ] Did you buy, sell, exchange or have foreclosed any real estate, including home?
- 29 [ ] Did you sell or trade any investments (including collectibles)?
- 30 [ ] Did you have any investments or bad debts that became worthless this year?
- 31 [ ] Did you make any payments on loans you had co-signed for someone else?
- 32 [ ] Did you exercise (purchase) or sell stock options issued by an employer?
- 33 [ ] Was any money withdrawn from an IRA, Sec. 529 plan, HSA, MSA, 401K, ROTH, life insurance, Coverdell IRA, or pension plan, where you did NOT get a Form 1099?
- 34 [ ] Did you receive any of the following? If yes, please circle. Winnings, damages, child support, disability income, VA income, insurance settlement, legal settlement, jury duty, alimony, election work, cash in savings bonds, income from hobby, prizes, gambling or lottery, tips, garage sales, sales on Ebay, scholarships, state tax refund
- 35 [ ] Did you have any of the following? If yes, circle. Alimony paid, adoption fees, bad debts, child care, casualty loss, student loan interest, hybrid/electric vehicle, post high school tuition, classroom supplies, long term health care
- 36 [ ] Did you make any energy-efficient improvements to real estate this year?
- 37 [ ] Did you pay medical insurance premiums (not on paycheck stub) or COBRA?
- 38 [ ] Did you or will you invest in a SEP, IRA, HSA, SIMPLE or ROTH this year?
- 39 [ ] Have you ever done a ROTH conversion? If yes, when? \_\_\_\_\_
- 40 [ ] If you deduct ANY expenses for entertainment and business meals, do you maintain the detailed WRITTEN information that IRS requires?
- 41 [ ] If you deduct any expenses for business vehicles, computers, or cell phones, do you have logbooks or other WRITTEN evidence showing the business use?
- 42 [ ] If you deduct charitable donations, do you have a receipt or document for each?

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I have reviewed the questions answered here and the data in the accompanying tax organizer (if any) and to the best of my knowledge it is true, correct, and complete. I have also read the professional services agreement printed on the back of this page and agree to its provisions.

Signature \_\_\_\_\_ Date \_\_\_\_\_