

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

- 1 [] Will ALL income be reported to the tax preparer, taxable or not?
- 2 [] If you need this return by a specific date, provide date & reason. _____
- 3 [] Do you want your return copy mailed, e-mailed, or both? (Circle one. If blank we e-mail.)
- 4 [] Has your address, e-mail, or phone numbers changed? If moved, date? _____
- 5 [] Has your bank account used for direct deposit of last year's refund changed?
- 6 [] Has IRS or a state corrected or audited a return since we last met?
- 7 [] Are you waiting on any Form W-2's, 1099's, or K-1's (as of appointment date)?
- 8 [] Do you want us to prepare any state or margin tax returns? Which states? _____
- 9 [] Have you ever declared bankruptcy or filed IRS Form 982? If yes, when? _____
- 10 [] Have you ever done a ROTH conversion? When? _____
- 11 [] Did you claim the first time homebuyer credit in 2008, 2009, or 2010?
- 12 [] Has an extension been filed? How much did you pay with extension? _____
- 13 [] If married, were you separated from your spouse from July to December?
- 14 [] Can anyone claim you as a dependent on their return?
- 15 [] Do you own or have signature authority on a FOREIGN bank or FOREIGN investment account?
- 16 [] Are you the beneficiary of a FOREIGN trust, FOREIGN estate, or FOREIGN gift?
- 17 [] Do you participate in or receive retirement from Canada or a foreign country?
- 18 [] Did you receive or make gifts over \$13,000 to any one person?
- 19 [] Did you do any bartering or trading, or belong to a barter club?
- 20 [] Did you pay anyone more than \$1700 to work in your home (maid, sitter, nurse)?
- 21 [] Were there any births, adoptions, marriages, divorces, or deaths in your household?
- 22 [] Were there any changes in dependents from the prior year?
- 23 [] Have any dependents filed their own return? (If yes, provide a copy).
- 24 [] Does anyone reside with you that you are not claiming as a spouse or dependent?
- 25 [] Do you have a child under age 24 with investment (not wage) income over \$1900?
- 26 [] Do you have a home equity, RV, or boat loan? (Circle one) [] Is it over \$100K?
- 27 [] Did you borrow or loan over \$10,000 to a relative or your business?
- 28 [] Do you have any BUSINESS loans guaranteed or co-signed by someone else?
- 29 [] Do you rent or lease any property to relatives, your corporation, or partnership?
- 30 [] Did you start a new business, buy a rental, or invest in a new K-1 investment?
- 31 [] Did you sell, trade, or cease using any assets on your Schedule C or F business?
- 32 [] Did you have any debt refinanced, cancelled, forgiven, or restructured? Year? _____
- 33 [] Did you buy, sell, exchange, repossess, or foreclose any real estate, including home?
- 34 [] Did you sell or trade any investments (including collectibles)?
- 35 [] Did you have any investments or bad debts that became worthless?
- 36 [] Did you make any payments on loans you had co-signed for someone else?
- 37 [] Did you exercise (purchase) or sell stock options issued by an employer?
- 38 [] Was any money withdrawn from an IRA, Sec. 529 plan, HSA, MSA, 401K, ROTH, annuity, life insurance, education IRA, or pension, where you have not given us a Form 1099?
- 39 [] Did you receive any of the following? Please circle which ones. Scholarships, 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 winnings, tips, garage sales, sales on eBay, or state tax refund.
- 40 [] Did you have any of the following? Please circle which ones. Bad debts, alimony paid, adoption fees, casualty or theft loss, student loan interest, hybrid/electric vehicle, post high school tuition, classroom supplies, child care, or long term health care.
- 41 [] Did you make any energy-efficient improvements to real estate?
- 42 [] Did you or will you invest in a SEP, IRA, HSA, SIMPLE or ROTH?
- 43 [] Did you pay medical insurance premiums directly? (Not deducted from your paycheck.)
- 44 [] If you deduct ANY expenses for entertainment and business meals, do you maintain the detailed WRITTEN information that IRS requires?
- 45 [] If you deduct any expenses for business vehicles or computers, do you have logbooks or other WRITTEN evidence showing the business use?
- 46 [] For charitable donations, do you have a receipt or document for each one over \$250?

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 _____