

We need you to complete the following questionnaire before you bring in your tax information for 2009. Please bring it with you along with supporting documentation for any yes answers.

Questionnaire

	YES	NO
Personal Information:		
Your Name.		
Did your marital status change during the year?	_____	_____
Did your address change from last year?	_____	_____
Can you be claimed as a dependent by another taxpayer?	_____	_____
Did you change any bank accounts during the year?	_____	_____
Did your email address change this year?	_____	_____
Dependent Information:		
Have there been any changes in dependents since last year?	_____	_____
Do you have any children under age 23 with unearned income in excess of \$1,700?	_____	_____
Purchases, Sales, and Debt Information:		
Did you start a new business or purchase rental property during the year?	_____	_____
Did you acquire a new or additional interest in a partnership or S corporation?	_____	_____
Did you sell, exchange, or purchase any real estate during the year?	_____	_____
Did you purchase a new home after 4-9-08 and before 12-01-09?	_____	_____
Did you acquire or dispose of any stock during the year?	_____	_____
Did you take out a home equity loan this year?	_____	_____
Did you refinance a principal residence or a second home this year?	_____	_____
Did you sell an existing business, rental, or other property this year?	_____	_____
Income information:		
Did you have any foreign income or pay any foreign taxes during the year?	_____	_____
Did you receive any income from property sold prior to this year?	_____	_____
Did you receive any lump sum payments from a pension, profit sharing or 401(k) plan?	_____	_____
Did you make any withdrawals from or contributions to an IRA, Keogh, SIMPLE, or SEP account?	_____	_____
Did you make any contributions/withdrawals to a Health Savings Account (HSA) during the year?	_____	_____
Did you make any withdrawals from an education savings/529 Plan account?	_____	_____
Did you do any IRA rollovers this year?	_____	_____
Did you use any IRA withdrawals for higher education expenses?	_____	_____
Did you use any IRA withdrawals for a home purchase?	_____	_____
Did you use any IRA withdrawals for medical expenses?	_____	_____
Did you receive any disability income during the year?	_____	_____
Did you cash any Series EE or I U. S. Savings bonds issued after 1989?	_____	_____
Itemized deduction information:		
Did you incur a casualty or theft loss during the year?	_____	_____
Do you have evidence to substantiate charitable contributions of \$250 or more?	_____	_____
Did you make any non-cash charitable contributions (clothes, furniture, vehicles, etc.)?	_____	_____
Did you have an expense account or allowance during the year?	_____	_____
Did you use your car on the job, for other than commuting?	_____	_____
Did you work out of town for part of the year?	_____	_____
Did you have any educational expenses or make any student loan interest payments during the year?	_____	_____
Did you have any expenses related to seeking a new job during the year?	_____	_____
Did you make any major purchases during the year (cars, boats, etc.)?	_____	_____

Questionnaire

(Continued)

	YES	NO
Miscellaneous information:		
Did you make gifts of more than \$12,000 to any individual?	_____	_____
Are you covered by a pension or retirement plan?	_____	_____
Did you incur moving costs because of a job change?	_____	_____
Did you receive correspondence from the State or Internal Revenue Service?	_____	_____
Did you purchase a hybrid vehicle during the year?	_____	_____
Did you make any home improvements that conserve energy?	_____	_____
Did you make any planned gifts this year?	_____	_____
Did you receive any dividends from a corporation?	_____	_____
Business information:		
Did you purchase any assets for business use?	_____	_____
Did you pay employee wages?	_____	_____
Does your business pay 100% of employee health insurance premiums?	_____	_____
Did you receive crop insurance or government disaster payments this year?	_____	_____
Did you pay anyone out of the business that should receive a 1099?	_____	_____
Did you sell any breeding livestock due to drought this year?	_____	_____
Do you have any breeding livestock due to be replaced by 12/31/09?	_____	_____