

**We need you to complete the following questionnaire
before you bring in your tax information for 2013.
Please bring it along with supporting
documentation for any yes answers.**

Additional items you must bring to us:

- W-2**
- 1099 (Including 1099Rs for retirement income)**
- Social Security Benefit Statement**
- 1098T (College Tuition Statements)**
- Form 8832 (Custodial Parent Release)**
- Settlement statement on any house purchases**
- Insure Montana Tax Credit Certificate**
- Child care information including provider's federal ID number**
- Cost of any stock sold (1099B)**

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 your bank account this year? (We want your refund going to the right account.)	_____	_____
Did your email address change this year?	_____	_____
Dependent Information:		
Have there been any changes in dependents since last year?	_____	_____
Are you a non-custodial parent claiming a dependent child?	_____	_____
Do you have any children under age 23 with unearned income in excess of \$2,000?	_____	_____
Do you provide more than 50% support for anyone other than your children?	_____	_____
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 acquire or dispose of any stock during the year? (If yes, include cost of stock sold.)	_____	_____
Did you take out a home equity loan this year?	_____	_____
Did you refinance a principal residence or a second home this year?	_____	_____
If yes, was the loan used for expenses other than your home?	_____	_____
Did you sell an existing business, rental, or other property this year?	_____	_____
Income information:		
Did you receive any social security benefits from retirement or disability this year?	_____	_____
Did you have interest in or signature authority over a foreign financial account this 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 or a prior year?	_____	_____
Did you use any IRA withdrawals for higher education expenses, a home purchase or medical costs?	_____	_____
Did you receive any disability income during the year?	_____	_____
Did you cash any Series EE or U. S. Savings bonds issued after 1989?	_____	_____

Questionnaire

(Continued)

YES

NO

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 (not just canceled checks)?	_____	_____
Did you make any non-cash charitable contributions (clothes, furniture, vehicles, etc.)?	_____	_____
Did you use your car for charitable purposes? Enter number of miles _____	_____	_____
Did you use your car for medical purposes? Enter number of miles _____	_____	_____
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 contribute to a charity directly from your IRA?	_____	_____

Miscellaneous information:

Did you receive a home buyer credit that needs to be repaid?	_____	_____
Did you make total gifts of more than \$14,000 during the year 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 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 pay any health insurance premiums for you or your family?	_____	_____
Did you purchase any assets for business use? (If yes, list for each item purchased whether its new or used and the purchase date.)	_____	_____
Did you pay employee wages?	_____	_____
Did you start a pension plan this year?	_____	_____
Does your business pay 50% or more of employee health insurance premiums?	_____	_____
Did you receive crop insurance or government disaster payments this year?	_____	_____
Did you pay anyone out of your business that should receive a 1099?	_____	_____
Did you sell any breeding livestock due to drought this year?	_____	_____
Did you have any breeding livestock due to be replaced by 12/31/13?	_____	_____

Employee away from home for business purposes:

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 an expense account or allowance or receive per diem during the year?	_____	_____
As an employee, is your job expected to take you away from home more than a year?	_____	_____