

2009 INDIVIDUAL TAX QUESTIONNAIRE

Personal Information

Name: _____

Primary E-mail: _____

Filing status changes? _____

Any dependent changes? _____

Address change? _____

Any phone number changes? _____

General Information and Questions for Tax Year 2009

Yes No

Have you received any correspondence from the IRS that has not been brought to our attention? (If yes, submit copies of all correspondence.)

Did you have an interest in or signature authority over a foreign financial account? (If yes, please review the [reporting rules](#) at www.irs.gov Form TD F 90-22.1.)

Did you receive money or property from an individual, business, trust or estate located in a foreign country?

Do you have any tax filing requirements in another state?

Did you or your business participate in any barter transactions?

Did you have any debt forgiven in 2009?

Did you make gifts (cash or property) in excess of \$13,000 to any individual during the year? (If yes, please provide recipient's name, address, relationship, along with gift description and amount.)

Do any of your dependent children have unearned income (interest, dividends, etc.) over \$850? (If yes, provide the statements.)

Have you read the charitable substantiation rules and maintain the appropriate documentation?

Did you pay any individual more than \$1,700 for household services during the year, such as cleaning, cooking, gardening, or babysitting/childcare? (If yes, we will contact you for more information.)

Do you own a traditional or Roth IRA?

Did you contribute to an IRA, Roth IRA or self-employed retirement plan?

Self Type: _____ \$ _____ Contribution date: ____/____/____

Spouse Type: _____ \$ _____ Contribution date: ____/____/____

Do you have a home equity loan? (If, yes clearly identify corresponding 1098 Mort Interest Stmt)

* If any portion of the loan was not used to improve your residence, please indicate the percentage here _____%.

Did your employer grant any stock options to you or did you exercise any stock options in 2009? (If yes, please attach all support documents.)