

Personal Information

Name: _____
Primary e-mail: _____
Filing status or dependent changes? _____
Address change? _____
Any phone number changes? _____

Questions

Yes No

- Have you received any correspondence or paid any fines/penalties from the IRS that has not been brought to our attention? (If yes, attach copies of all correspondence.)
- Did you have an interest in or signature authority over a foreign financial account or have financial accounts/assets/interests maintained or issued by a foreign entity?
- Do you have any tax filing requirements in another state? List: _____
- Did you or your business participate in any barter transactions?
- Did you receive any other income or non-taxable income? List: _____
- Did you pay or receive alimony?
- Did you have any debt forgiven, including debt on your personal residence or file for bankruptcy?
- Did you make gifts (cash or property) in excess of \$13,000 to any individual during the year?
- Do any of your dependent children have unearned income (interest, dividends, etc.) over \$950?
- Did you pay sales tax on the purchase of a vehicle, boat, motorcycle or certain construction costs?
- Did you make any qualified residential energy improvements to your home?
- Have you read the charitable substantiation rules and maintain the appropriate documentation?
- Did you pay any individual (not a business) more than \$1,700 for household services during the year, such as cleaning, cooking, gardening, or babysitting/childcare?
- Do you own a traditional or Roth IRA? If yes, please circle.
- Did you contribute to an IRA, Roth IRA or self-employed retirement plan? If yes, please provide the statement of contribution(s).
- Did you purchase, sell or refinance your home? (If yes, submit the HUD statement.)
- Do you have a home equity loan? (If yes, clearly identify corresponding 1098 Mortgage Interest Statement.)
- Did you receive a home buyer credit in the past?
- Did your employer grant any stock options to you or did you exercise any stock options in 2011?

Signature _____ **Date** _____