

Name: _____ Phone number: _____

Email address: _____ (if you prefer we contact you by email)

2011 (tax year)

TAX INFORMATION QUESTIONNAIRE

The following questions help us understand your current year tax situation. If you are filing jointly, each question applies to your spouse. Please answer each question by circling yes (Y) or no (N). **For every question you answered yes, please provide details in the blank lines at the end of this questionnaire and include your tax form/documentation received.** If a question does not pertain to you, please circle no. If you require help answering any of these questions, please contact us.

- Y N 1. Would you like to have an electronic copy of your tax return (PDF file)?
- Y N 2. Did your marital status change during the year?
- Y N 3. Were you a resident of, or did you have income in, more than one state during the year?
- Y N 4. Do you have any dependents living with your or are you supporting anyone not living with you? If yes, provide details if there were any changes to any dependents in your household (births, marriages, deaths, etc.)
- Y N 5. Did any dependent children under age 18 (24 if a college student) have any income (wages, interest, etc.)?
- Y N 6. Are you or any dependents blind and/or disabled? Please provide details including any disability income received.
- Y N 7. Did you incur child care or dependent care expenses?
- Y N 8. Did you or any member of your household pay educational expenses for post-secondary education?
- Y N 9. Did you buy, sell, or trade any assets?
- Y N 10. Did you have any investments become worthless or were you a victim of investment theft in 2011?
- Y N 11. Do you own a business or an interest in a partnership, corporation, LLC, or other venture?
- Y N 12. Outside of W-2 contributions (401k, 403b, etc.) did you contribute to or receive a distribution from any retirement plan or did you convert any retirement funds to Roth funds?
- Y N 13. Did you roll over any amounts from a retirement account in 2011?
- Y N 14. Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?
- Y N 15. Did you contribute or receive a distribution from a Health Savings Account (HSA)?
- Y N 16. Did you pay sales taxes on a major purchase in 2011, such as a vehicle, boat, or home?
- Y N 17. Did you make cash or noncash charitable contributions?
- Y N 18. Did you have any casualty or theft losses?
- Y N 19. Did you purchase or sell a home in 2011? (Provide closing statement)
- Y N 20. If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased?
- Y N 21. Did you receive the First-Time Homebuyer Credit from purchasing a home prior to 01/01/2009?
- Y N 22. Did you refinance a mortgage or take a home equity loan? (Provide closing statement)
- Y N 23. Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?
- Y N 24. Did you purchase a new energy-efficient car, truck, or van? _____(please initial)

