Individual Federal and State Tax Return Questionnaire

Please **review, complete and return this questionnaire** along with your tax paperwork:

If I have not prepared your prior year return, please provide it. Doing so makes the current year preparation efficient. If there is a NEW dependent living in your house, please provide the name and social security number of that person. Feel free to ask me questions anytime. **Completing this checklist will greatly facilitate the preparation of your tax returns which assists in keeping my fee at a reasonable amount.**

Please answer the following questions by writing 'yes', 'no' or the requested information in the margin.

- Did you adopt any child(ren) in 2007? If so, provide name and SS# or other ID#.
- Did your marital status change during 2007? If so, to what.
- Did your address change in 2007 or 2008? If so, please provide address and date it changed. The address listed on the prior year's return will be the address used unless you tell me otherwise.
- Do you have any children under age 19 with unearned income (interest or dividends) of over $800?
- What are the dates of birth for all persons that will be listed on the tax return?
- **Can you or your spouse** (not 'will you') be claimed as a dependent by another taxpayer?
- Are any of your dependents married? Do they have children?
- Were there any changes in dependents from the prior year? If yes, explain and if there is a new dependent, provide name and SS#.
- Amount of child care you paid while you worked or looked for work?
- Did you sell any assets in 2007 (house, stocks, business ownership or stock club ownership)?
- Did you pay any estimated tax payments towards 2007 taxes on the dues dates of April 15th 2007, June 15th 2007, Sept 15th, 2007 or January 15th 2008? If so, please write the amount paid for federal and for state taxes.
- Did you make any large purchases in 2007, like a car, boat, RV, other? If so, provide sales tax paid on item.
- Did you cash in any retirement funds early? If so, please provide name of company and how much. Please also provide the 1099-R form.
- What state were you a resident of for 2007?
- If you were part year residents, please provide dates of residency and the names of the states.
- What was your county of residence as of January 1, 2007?
- What was your spouse's county of residence as of January 1, 2007, if applicable?
- What was your county of employment as of January 1, 2007?
- What was your spouse's county of employment as of January 1, 2007, if applicable?
- What school district do you currently live in?
- Are you planning on contributing to a Roth, deductible or nondeductible IRA?
- Did you incur higher education costs or pay interest on student loans? If so, please provide amounts.
- If you incurred higher education costs, what year of college is your dependent in?
- Did you contribute to a section 529 college savings plan in 2007?
- Do you, your spouse or dependents have trusts?

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- What account do you want your refund/pymt to be deposited/taken? Provide the name of financial institution, account number, routing number and whether it is a checking or savings account.
- Please provide the birth date of everyone listed on the 2007 tax return (yourself, your spouse and all dependents, if applicable). The age of a person can dictate whether you qualify to receive certain credits and deductions.
- Do you want to electronically pay taxes due via check or credit card (if yes, see separate checklist)?
- If you have a refund, do you want a rapid anticipation loan?
- May I be authorized to speak to the IRS or state, on your behalf, in the event they have questions about your return?

Please remember to submit the following most common **income** items:

- W-2 forms for wages
- 1099 Div forms for dividend income
- 1099 Int forms for interest income
- 1099 R forms for retirement income
- Gambling Income
- Other Income – 1099 Misc for rent received or non employee compensation
- Tax refund form 1099 G for last year's refund
- Unemployment compensation
- Business income
- Any other – please indicate and provide tax form if you received something

Please remember to submit the following most common **expenses** to deduct (amount can be written in right margin but I would also like to see the supporting document(s)):

- Real estate taxes, please provide tax form if it is available
- Mortgage Interest (will be on a 1098 form)
- Contributions, please provide as much substantiation as possible – one time donations of $250 or more (cash or non cash) require a letter of substantiation from the donor **
- Business expenses (please provide detail on a separate page)
- Gambling expenses
- If you, or your spouse, teach, I will presume you incurred teaching expenses of $250, the maximum deduction, unless you tell me otherwise.
- Any moving expenses
- Student loan interest, please provide forms
- Uniforms, union dues, safe deposit box fee, expenses related to investment income and/or last year's tax prep fee (all these are miscellaneous deductions)
- Tuition or fees for higher education, please provide forms
- Personal property tax portion on all vehicles owned by you; please note that the only deductible portion is the excise tax and not the entire amount paid
- Unreimbursed employee expenses such as union dues, job mileage (but not commuting miles), job education or job tools
- What amount of residential rent did you pay in 2007?
- Any other deduction information

Please provide phone numbers where I may reach you most efficiently.

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Medical expenses (prescription drugs, doctor/dentist fees, hospital fees, glasses, contacts, etc.) generally cannot be deducted unless you incur a lot. The amount to deduct is dependent upon your adjusted gross income.

** Changes in IRS Code Section 170 with regards to cash and non cash contributions:

- Cash contributions: 'no deduction shall be allowed for any contribution of a cash, check or other monetary gift unless the donor maintains as a record of such contribution, a bank record or a written communication from the donee showing the name of the donee organization, the date of the contribution and the amount of the contribution.' The new recordkeeping requirements may not be satisfied by maintaining other written records.
- Non cash contributions: contributions of clothing or household items (furniture, electronics, appliances, linens and other similar items) will be allowed only if the items is in good 'used condition' or better; meaning it is suitable for its original intended purpose without repair or refurbishing.