



Individual Federal and State Tax Return Questionnaire

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

If I have not prepared your prior year return, please provide it. **Completing this checklist will greatly facilitate the preparation of your tax returns which assists in keeping my fee at a reasonable amount.**

Please remember to submit the following most common income items:

- W-2 forms for wages
- Copy of your last paycheck stub(s), if available
- 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 provide detail

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
- Mortgage Interest (Form 1098)
- Interest paid on an RV
- Contributions, please provide substantiation – cash or non cash
- Business expenses (please provide detail)
- 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
- Excise tax portion on your personal vehicles (on your car registration)
- Unreimbursed employee expenses such as union dues, job mileage (but not commuting miles), job education or job tools
- Residential rent paid in 2008
- Any other deduction information – provide detail

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

Stephanie M. Bauer
Certified Public Accountant

T 812.932.1399
F 812.932.1499
C 513.602.0632



1688 Lammers Pike
Batesville, IN 47006
stephanie@bauer-cpa.com

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

- Did you adopt any child(ren) in 2008? If so, provide name and SS# or other ID#.
- Did your marital status change during 2008? If so, to what.
- Did your address change in 2008 or 2009? 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 your 2008 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 2008 (house, stocks, business ownership or stock club ownership)?
- Did you pay any estimated tax payments towards 2008 taxes on the dues dates of April 15th 2008, June 15th 2008, Sept 15th, 2008 or January 15th 2008? If so, please write the amount paid for federal and for state taxes.
- Did you make any large purchases in 2008, 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 2008?
- 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, 2008?
- What was your spouse's county of residence as of January 1, 2008, if applicable?
- What was your county of employment as of January 1, 2008?
- What was your spouse's county of employment as of January 1, 2008, if applicable?
- What school district do you currently live in?
- Are you planning on contributing to a Roth IRA, deductible IRA 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 2008?
- If yes, was it an Indiana 529 college savings plan?
- Do you, your spouse or dependents have trusts?
- 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.
- Do you want to electronically pay taxes due via check or credit card (if yes, see separate checklist)?
- May I be authorized to speak to the IRS or state, on your behalf, in the event they have questions about your return?
- What is your email address?

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