

INDIVIDUAL TAX CLIENTS REQUESTED INFORMATION FOR 2009

- ❖ **PLEASE ANSWER ALL APPLICABLE QUESTIONS TO AVOID A FEE INCREASE OF \$100 OR MORE. YOU MUST ANSWER QUESTION 1, THE DIRECT DEPOSIT QUESTION, TO RECEIVE ANY REFUND BY DIRECT DEPOSIT.**

QUESTIONNAIRE:

Personal Information:

1. If you receive a refund, please check the appropriate box:
 Direct Deposit: **Same Account Information as last year.**
 Direct Deposit: **New Account:** Bank Name _____
Account Number _____ Routing Number _____
 Paper Check
2. How would you like us to contact you with our questions or missing items?
____ **E-mail:** E-mail address _____
or ____ **Telephone:** Telephone number _____
3. Did your address change last year (2009)? ____ Yes or ____ No If yes, please list new address _____
4. Did your marital status change last year (2009)? ____ Yes or ____ No
If yes, please describe _____
5. Did your dependents change from 2008? ____ Yes or ____ No
If adding a new dependent list the social security number, date of birth, and relationship

Did any of your dependents turn 17 in 2009? ____ Yes or ____ No
Are any of your dependents over 18? ____ Yes or ____ No
If yes, were they a full-time student for more than 5 months of the year? ____ Yes or ____ No

Are you divorced with children **and** have the children less than 6 months out of the year, **and** planning to claim the exemption for the child? ____ Yes or ____ No If yes, you will need to have form 8332 signed by the custodial parent and provide to us (please let us know if you need a copy of the form 8332).

Deductions:

6. List the total amount of the ownership tax **paid in 2009 for all vehicles** (please use the amounts under ownership tax and prior O. T. on your vehicle registrations): Total amount: _____
7. Inform us if you paid interest on a boat or motor home. **We will need the name of the bank, address, tax id number and amount of interest paid in 2009.** _____
8. Did you buy a new car/truck/motorcycle in 2009? ____ Yes or ____ No
If Yes, please provide a copy of the invoice.
9. Inform us of any charitable contributions. For Non-cash contributions, provide us with a receipt, the description of what was donated, the fair market value amount and the date of the contribution. List your volunteer mileage for 2009: _____
10. Did you buy a home in 2009? ____ Yes or ____ No If Yes, please provide the closing statement. Did you sell a home in 2009? ____ Yes or ____ No If yes, please provide the closing statement.
11. Did you refinance or borrow on home equity? ____ Yes or ____ No If Yes, please provide the closing statement and describe use of funds _____

This list is not all inclusive. Let us know of any additional information that pertains to your tax return.

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12. Inform us if you had any debts cancelled or forgiven. **Provide the 1099-C.**
13. **Provide amounts of property (real estate) taxes paid in 2009 even if you are not itemizing.**
14. Inform us if you paid any student loan interest. **Provide from 1098 E.**
15. Inform us if you, your spouse, or a dependent incurred any tuition expenses to attend a college, university, or vocational school. **Provide 1098-T.**
16. Inform us of any daycare expenses paid in 2009. Please list provider's name, address, and taxpayer identification number and total amount paid to the provider. Also, please list the dependent name for which the daycare expenses were paid.

Investment Information:

17. Retirement plan contributions (OTHER THAN THROUGH YOUR EMPLOYER): List the amounts you contributed, or plan to contribute by **4/15/10**.
Amount: _____ Date of contribution: _____
Please specify type of IRA – Traditional or Roth
Inform us if you took an early distribution from a retirement plan, and explain the reason. If the money was reinvested in 60 days we need to know that as well. **Provide the 1099-R.** _____

Inform us if you converted any part of your traditional IRA, SEP, or Simple IRA to a Roth IRA.

18. Did you make any 529 contributions to a fund **in 2009**? Yes or No
If yes, list amount: _____ Name of Plan: _____
19. Did you have a financial interest in a foreign account over \$10,000? Yes or No
20. Inform us if you started a business, purchased rental property, or acquired an interest in a partnership or corporation? _____
21. If you sold any stocks, bonds or other investment property in 2009, **provide detail of cost basis, selling price, and dates of original purchase and selling date and form 1098-B**
22. Do you have any worthless stock this year? Yes or No If Yes, please describe.

23. Did you withdraw any money from your Health Savings Account (HSA)? Yes or No
If yes, were they all for medical expenses? Yes or No **Please provide form 1099-SA for the distributions.**
Did you make contributions to your HSA for 2009 (include contributions prior to 4/15/10 to be deducted in 2009)? Yes or No If yes, indicate the amount you contributed _____.

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