INDIVIDUAL TAX CLIENTS REQUESTED INFORMATIOIN

- **KRUGER & CLARY WILL OFFER A DISCOUNT ON YOUR TAX PREPARATION FEES IF ALL APPLICABLE QUESTIONS ARE ANSWERED AND REQUESTED INFORMATION ON BACK IS PROVIDED AT THE SAME TIME.**

QUESTIONNAIRE:

1. If your address changed from last year please list ______________________________________

   ____

2. Did you marital status change last year (2008)? ____Yes or ____No

   If yes please describe ____

3. Did your dependents change from 2007? ____Yes or ____No

   If yes please describe____

   If adding a new dependent list the social security number, date of birth, and relationship

   ____

   Are any of your dependents going to be 17 years old 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

4. How would you like us to contact you with our questions or items we are missing?

   _____ E-mail or _____ Telephone

5. Please give us the best phone number to contact you: _________________________________

6. If available, list your e-mail address ____

7. Retirement plan contributions: list the amounts you contributed, or plan to contribute by 4/15/09.

Type of plan: _______________ Amount: ________________ Date of contribution: __________

Please specify type of IRA – Traditional, Roth or Simple

8. Did you withdraw any money from your Health Savings Account (HSA)? ____Yes or ____No

   Please provide form 1099-SA for the distributions.

   If yes, were they all for medical expenses? ____Yes or _____No

9. Did you make any 529 contributions to fund for a dependent? ____Yes or ____No

   If yes, list amount: ___________ Date of contributions: ___________ For which state

   ____

10. For the **Total amount** of **all** your vehicle registrations, list the ownership tax **paid in 2008** (please use the amounts under own tax and prior o. t.): Total amount: ________________

11. If you receive a refund and would like a direct deposit please list the following Information:

    Bank Name _________________________ Routing Number: ____________________

    Bank Account Number: ___________________

    Leave blank if you want a paper check if you receive a refund.

12. If you need estimated tax coupons do you expect your 2009 income to be similar to 2008?

    _____Yes or _____No If "No" please describe _______________________________________

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

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CHECKLIST OF NEEDED DOCUMENTS IF APPLICABLE:

- Provide the Notice 1378/1099-G for the stimulus payment and/or for state refunds.
- Inform us if you started a business, purchased rental property, or acquired an interest in a partnership or Corporation?
- If you sold any stocks, bonds or other investment property in 2008, **provide detail of cost basis, selling price, and dates of original purchase and selling date and form 1098-B**.
- Inform us if you had any debts cancelled or forgiven. **Provide the 1099-C**.
- 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.
- Inform us if you made contributions to a health savings account (HSA) for 2008. Include contributions prior to 4/15/09 to be deducted for 2008.
- Inform us if you paid any student loan interest. **Provide from 1098 E.**
- 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 2008.**
- Inform us if you purchased, sold, or refinanced your principal home or a second home, or took a home equity loan. **We need closing statements, and a summary of any refinancing proceeds used for home improvements.**
- **Provide amounts of property (real estate) taxes paid in 2008 even if you are not itemizing.**
- Inform us of any charitable contribution. 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.
- Inform us and **provide proof of sales receipts** if you added energy efficient property to your home in 2008. Also, if you purchased a new hybrid vehicle in 2008 **provide the sales document**.
- Inform us if you, your spouse, or a dependent incurred any tuition expenses to attend a college, university, or vocational school. **Provide 1098-T and what year in school the student is.**
- Inform us if you received a distribution from an Education Savings Account or a Qualified Tuition Program. **Provide 1099-Q.**
- Inform us if you are a non-custodial parent claiming a dependent. You will be required to have the custodial parent sign an IRS Form 8332 and **give us the signed form** so we can attach it to your tax return. You can print a copy of Form 8332 from our website: www.krugercpas.com under Links and Downloads in commonly requested forms.

Are you interested in talking with us on any of the following services, please circle any that apply;

Financial Needs Analysis	Education Planning
Retirement Planning	Life Insurance Planning
Investment Planning	Tax Planning

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