

Questions

Please check the appropriate box and include all necessary details and documentation.

| | Yes | No |
|--|--------------------------|--------------------------|
| Personal Information | | |
| Did your marital status change during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____ | | |
| Did your address change from last year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Can you be claimed as a dependent by another taxpayer? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Dependent Information | | |
| Were there any changes in dependents from the prior year? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____ | | |
| Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$1,900? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have dependents who must file a tax return? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you provide over half the support for any other person(s) during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care while you worked or looked for work? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any expenses related to the adoption of a child during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? | <input type="checkbox"/> | <input type="checkbox"/> |
| Purchases, Sales and Debt Information | | |
| Did you start a new business or purchase rental property during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire a new or additional interest in a partnership or S corporation? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell, exchange, or purchase any real estate during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you purchase or sell a principal residence during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you foreclose or abandon a principal residence or real property during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire or dispose of any stock during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you take out a home equity loan this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you refinance a principal residence or second home this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell an existing business, rental, or other property this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you incur any non-business bad debts this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any debts canceled or forgiven this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you purchase a new hybrid, alternative motor, or electric motor energy efficient vehicle this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any student loan interest this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Income Information | | |
| Did you have any foreign income or pay any foreign taxes during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any income from property sold prior to this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401k, or other qualified retirement plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any withdrawals from an education savings or 529 Plan account? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any distributions from a Health savings account (HSA), Archer | | |

| | | |
|--|---|---|
| MSA, or Medicare Advantage MSA this year? | p | p |
| Did you receive any Social Security benefits during the year? | p | p |
| Did you receive any unemployment benefits during the year? | p | p |
| Did you receive any disability income during the year? | p | p |
| Did you receive tip income not reported to your employer this year? | p | p |
| Did any of your life insurance policies mature, or did you surrender any policies? | p | p |
| Did you cash any Series EE or I U.S. Savings bonds issued after 1989? | p | p |

Itemized Deduction Information

| | | |
|---|---|---|
| Did you incur a casualty or theft loss during the year? | p | p |
| Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? | p | p |
| Do you have evidence to substantiate charitable contributions? | p | p |
| Did you make any noncash charitable contributions (clothes, furniture, etc.)? | p | p |
| Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C. | p | p |
| Did you have an expense account or allowance during the year? | p | p |
| Did you use your car on the job, for other than commuting? | p | p |
| Did you work out of town for part of the year? | p | p |
| Did you have any expenses related to seeking a new job during the year? | p | p |
| Did you make any major purchases during the year (cars, boats, etc.)? | p | p |
| Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax? | p | p |

Miscellaneous Information

| | | |
|---|---|---|
| Did you make gifts of more than \$13,000 to any individual? | p | p |
| Did you have any educational expenses during the year? | p | p |
| Did you make any contributions to an education savings or 529 Plan account? | p | p |
| Did you make any contributions to a Health savings account (HSA) or Archer MSA? | p | p |
| Did you pay long-term health care premiums for yourself or your family? | p | p |
| Did you pay any COBRA health care coverage continuation premiums? | p | p |
| If you are a business owner, did you pay health insurance premiums for your employees this year? | p | p |
| Did you utilize an area of your home for business purposes? | p | p |
| Did you engage in any bartering transactions? | p | p |
| Are you an active participant in a pension or retirement plan? | p | p |
| Did you retire or change jobs this year? | p | p |
| Did you incur moving costs because of a job change? | p | p |
| Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? | p | p |
| Did you pay any individual as a household employee during the year? | p | p |
| Did you make energy efficient improvements to your main home this year? | p | p |
| Were you a grantor or transferor for a foreign trust, or do you have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country? | p | p |
| Did you receive correspondence from the State or the Internal Revenue Service? If yes, explain: _____ | p | p |
| Do you want to designate \$3 to the Presidential Election Campaign Fund? | | |
| If you check yes, it will not change your tax or reduce your refund. | p | p |