2011 Client Tax Questionnaire

Please provide us with details on any of the following items that pertain to you:

NOTES

- ❑ Change of name w/ SSA (e.g. if recently married)
- ❑ Change of marital status
- ❑ Change of contact phone number(s)
- ❑ Change of mailing address
- ❑ Change in e-mail address
- ❑ Change of occupation
- ❑ Change of dependents
- ❑ Change of bank account for direct deposit of refund
- ❑ Cost of health insurance, if self-employed
- ❑ Regarding business use of vehicle
  - Year, make and model of vehicle
  - Cost and date placed into service?
  - Vehicle's weight and length?
  - Please provide mileage
    - Business
    - Personal
    - Commuting
    - Total
- ❑ If you sold stocks, bonds or mutual funds (please provide a computation of your cost basis or a "realized gain / loss" statement from your broker)
- ❑ If you bought or sold real estate (please provide a settlement sheet for each property)
- ❑ If you paid or received alimony
- ❑ If you incurred qualified educator expenses (for teachers/administrators K-12 only)
- ❑ If you contributed to a traditional or Roth IRA (please provide form 5498, if available)
- ❑ If you contributed to a SEP or profit sharing plan
- ❑ If you contributed to a 529 education savings plan
- ❑ If you paid student loan interest (please provide form 1098-E from the lender)
- ❑ If you paid college tuition (please provide form 1098-T from the institution)
- ❑ If you made contributions to a MSA or HSA (please provide form 1099-SA from the trustee)
- ❑ Provide computation of the following deductions:
  - Medical exps (if greater than 7.5% of AGI)
  - Real estate taxes (if not on mtg. stmt.)
  - Mortgage interest (if not on mtg. stmt)
  - Charitable contributions (cash & non-cash)
  - Unreimbursed job related costs
- ❑ If you incurred costs for childcare (we need the care-provider names, addresses and TINs as well as the cost breakdown by provider <u>and</u> by child)
- ❑ If you made energy saving improvements to your home or business (http://www.energystar.gov/)
- ❑ Did you purchase taxable products or services for which no state sales tax was collected?
- ❑ If you paid federal and/or state estimated taxes
  - 1st quarter (due by 4/15/11)
  - 2nd quarter (due by 6/15/11)
  - 3rd Quarter (due by 9/15/11)
  - 4th Quarter (due by 1/15/12)