

## Questions

Please check the appropriate box and include all necessary details.

|  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| <b>Personal Information</b>  |                          |                          |
| 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"/> |
| <b>Dependent Information</b>   |                          |                          |
| 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 18 with unearned income in excess of \$1700?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Purchases, Sales and Debt Information</b>   |                          |                          |
| 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 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"/> |
| <b>Income Information</b>  |                          |                          |
| 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, Keogh, SIMPLE, or SEP account?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any withdrawals from or contributions to a retirement plan (including IRA) due to Hurricane Katrina, Rita, or Wilma?                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any withdrawals from an education savings/529 Plan account?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any disability income during the year?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did any of your life insurance policies mature, or did you surrender any policies?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you cash any Series EE or I U.S. Savings bonds issued after 1989?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Itemized Deduction Information</b>  |                          |                          |
| Did you incur a casualty or theft loss during the year?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have evidence to substantiate charitable contributions of \$250 or more?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any noncash charitable contributions (clothes, furniture, vehicles, etc.)?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have an expense account or allowance during the year?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you use your car on the job, for other than commuting?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you work out of town for part of the year?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any educational expenses or make any student loan interest payments during the year?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any expenses related to seeking a new job during the year?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any major purchases during the year (cars, boats, etc.)?  | <input type="checkbox"/> | <input type="checkbox"/> |

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?

**Miscellaneous Information**

Did you make gifts of more than \$12,000 to any individual?

Did you engage in any bartering transactions?

Are you covered by a pension or retirement plan?

Did you incur moving costs because of a job change?

Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?

Did you receive correspondence from the State or the Internal Revenue Service?

If yes, explain: \_\_\_\_\_

Do you want to designate \$3 to the Presidential Election Campaign Fund?

Checking yes will not change your tax or reduce your refund.