

## 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"/> |
| Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS 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"/> |
| 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"/> |
| <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"/> |
| Did you purchase a new hybrid or alternative motor vehicle this year?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Income Information</b>   |                          |                          |
| 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 an education savings or 529 Plan account?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any distributions from a health savings account (HSA) this year?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you or your spouse have any gambling income during the year?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you or your spouse receive any disability income during the year?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Itemized Deduction Information</b>   |                          |                          |
| Do you have evidence to substantiate charitable contributions?  | <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 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, home materials, etc.)?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Miscellaneous Information</b>  |                          |                          |
| Did you make any energy efficient improvements to your home?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Were you, your spouse, or any dependents enrolled in postsecondary education?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay student loan interest?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 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? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you want to designate \$3 to the Presidential Election Campaign Fund?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Checking yes will not change your tax or reduce your refund.  |                          |                          |

Please provide your cell phone numbers if we can contact you on your cell phone.

\_\_\_\_\_  
Name

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Cell

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Name

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Cell