



2011 TAX INFORMATION QUESTIONNAIRE

The following questions help us understand your current 2011 tax situation. Please answer each question by circling yes (Y) or no (N); **sign and return the completed form** to us with your tax information. If a question does not pertain to you, please circle no. If you require help answering any of these questions, please contact us.

- Y N 1. Would you like to have your tax return mailed to an address other than the one we have on file?
- Y N 2. Electronic filing is now mandated for most tax preparers with some exceptions. One exception is a written request by the taxpayer not to electronically file. Do you wish to file a written request not to electronically file?
- Y N 3. Do you wish to have \$3 (or \$6 on a joint return) of your taxes applied to the Presidential Campaign Fund (this will not affect the amount of refund or balance due on your tax return)?
- Y N 4. On your state tax return, do you wish to make any political, charitable or other type of contributions?
- Y N 5. Did you file for bankruptcy or have a foreclosure /short sale or cancellation of debt (mortgage, credit card, etc) in 2011? (If yes, please provide documentation and copies of any 1099-A or 1099-C you receive).
- Y N 6. Did your address, phone number or e-mail address change during the year? If yes please provide the new information on the bottom of this form.
- Y N 7. Did your marital status change?
- Y N 8. Did you have any dependents living with you or were you supporting anyone not living with you?
- Y N 9. Were there any births, deaths, or marriages in your household or did any children cease to be your dependent?
- Y N 10. Did any of your children (whether claimed as a dependent or not) under age 19 (or 24 if a full-time student) have any income (wages, interest, dividends, capital gains, etc.)?
- Y N 11. Did you incur childcare or dependent care expenses?
- Y N 12. Did you adopt a child during the year 2011?
- Y N 13. Did you receive or pay any alimony or separate maintenance payments?
- Y N 14. Did you receive unemployment benefits?
- Y N 15. Were you a resident of, or did you have income in, or own property in, more than one state during the year?
- Y N 16. Are you, your spouse or any dependents blind/or disabled?
- Y N 17. Did you, your spouse or any dependent receive disability payments?
- Y N 18. Did anyone in your household receive Social Security, retirement or annuity benefits?
- Y N 19. Outside of W-2 contributions (401k, 403b, etc.) did you contribute to, or receive disbursements from, any retirement plan, or did you convert any retirement funds to Roth funds?
- Y N 20. Did you buy, sell, or trade stocks, bonds, mutual funds, or any other assets during the year?
- Y N 21. Did you have any interest, dividends or capital gain income?
- Y N 22. Did you have any investment related expenses?
- Y N 23. Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country?
- Y N 24. Did you own a rental property? (If yes please complete the enclosed rental property information.)
- Y N 25. Did you own a vacation home that was rented to someone else at anytime during the year?
- Y N 26. Have you ever claimed the homebuyer credit? If yes, have you sold this home or converted it to business or rental use? Y ___ N ___
- Y N 27. Did you have purchasing, selling, refinancing, financing, or foreclosing transactions on your personal residence or any other real estate? If yes, provide the settlement document (HUD-1), Form 1099-S, Form 1099-C or other related documentation if applicable.
- Y N 28. Did you make any large purchases or home improvements (e.g. purchase a vehicle, trailer, etc), or did you make any energy saving improvements to your home (e.g. insulation, windows, doors)?

(continued on reverse side)

