

2011 Tax Information Questionnaire

(To be completed by all tax clients)

Name: _____

Address: _____

Email address: _____

Phone:(Circle

Best # to call) (H)_____ (W)_____ (Cell)_____

***** For Clients Dropping Off.....Please provide details to all "yes" answers on next page**

Yes No

GENERAL INFORMATION

1		Were there any births, adoptions, marriages, divorces, or deaths in your household or did any children cease to be your dependents in 2011?
2		Did you have any life changing issues during 2011 (i.e. retirement, children graduating, etc?)
3		Did any of your dependent children have any income (wages, interest, etc?) (possible kiddie tax)
4		Do you have any dependents living with you or are you supporting anyone not living with you?
5		Are you or any of your dependents disabled?
6		Can you or your spouse be claimed as a dependent by someone else?
7		Did you incur child care or dependent care expenses in 2011? If so, we need name, address, EIN or Soc Sec # of provider & amount paid for each child.
8		Did you have a change in residence or job location during the year?
9		Did you move during 2011? From where _____ Date of move _____
10		Did you reside in more than one state during 2011? If yes, which states? _____
11		Did you receive any notices from the IRS or the State? If yes, please attach.
12		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)? Do you wish to contribute to any state funds, and if so, which funds?
13		Would you like your refund (if applicable) to be deposited directly into your bank? If so, provide Name of Bank _____ Bank Routing # _____ and Account # _____ and state whether this is a checking or savings:

Yes No

INCOME INFORMATION

14		Have you received all W-2's from all employers? How many W-2's are attached? _____
15		Did you use your vehicle on the job other than for commuting to work? (Please provide mileage log)
16		Does your employer reimburse you for mileage? _____ Is the amount included in your W-2? _____
17		Did you use an employer provided vehicle which you drove home or used personally?
18		Did you work out of town at any time during 2011?
19		Did you earn income from a state other than the state in which you live? If yes, what state? _____
20		Did you or your spouse receive any tips not reported to your (or your spouse's) employer?
21		Did you have any interest, dividend, or foreign income?
22		Did you buy, sell, or trade any assets (stocks, real estate, etc) during the year?
23		During 2011, did you have an interest in, or signature over a bank or brokerage account in a foreign country, or were you a grantor of or transferor to a foreign trust?
24		Did you earn interest from, or are you an authorized signature holder on, a foreign bank account?
25		Did you have any income from, or pay taxes to, a foreign country?
26		Did you engage in any type of bartering transactions in 2011?
27		Did you surrender any U.S. Savings Bonds during 2011? If yes, see next question.
28		Did you cash any series EE or I U.S. Bonds that were issued after 1989 to pay for college?
29		Did you receive any state or local income tax refunds from prior years?
30		Do you or your spouse have any IRA accounts?

OVER

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		31	Did you withdraw money from any retirement accounts or "rollover" a retirement plan into another plan? (Including your RMD)
		32	Did you convert any retirement funds to ROTH funds?
		33	Did you recharacterize any IRAs this year?
		34	Did you receive a Schedule K-1 from a Partnership, S-Corp, Trust or Estate? If so, please attach
		35	Did you or your spouse receive any social security benefits during the year? Attach Form(s) SSA-1099
		36	Did you receive any disability income during 2011? \$_____ Attach 1099-R.
		37	Did you receive any type of prize or award during 2011, including lottery or gambling winnings? (daily gambling log??)
		38	Did you or your spouse receive any unemployment benefits during 2011?
		39	Did you or your spouse receive any Combat Pay or Jury Duty Pay?
		40	Did you or your spouse receive any alimony, or separate maintenance payments?
		41	Did you exercise any stock options in 2011?
		42	Did you have any credit card debt forgiven in 2011? Did you receive a 1099C?
		43	Does anyone owe you money which has become uncollectible?
		44	Did you receive any income not mentioned in the above questions? If so, what kind? _____

Yes No

BUSINESS/ RENTAL INFORMATION

		45	Do you own a business? Please provide all business income and expenses
		46	Did you make any payments in 2011 that would require you to send out Form 1099? If yes, did you or will you send out all required forms?
		47	Did you hire any employees (after Feb 3, 2010 and before January 1, 2011) who were still in your employ 52 weeks later?
		48	Did you purchase any business assets (furniture, equipment, etc) or converted any assets to business use during the year? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, and business use percentage.
		49	Did you dispose of any business assets (including real estate)? If yes, please list on an attached sheet the date removed from service, selling price and expense of sale.
		50	Do you accept credit card payments in your business?_____ If so, did you receive Form 1099-K? _____
		51	Do you own rental property? What percentage of time did you spend managing your rentals? _____ Please provide all rental income and expenses
		52	Did you purchase any rental property assets (furniture, appliances, etc) or converted any assets to business use during the year? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, and business use percentage.
		53	Did you dispose of any rental property assets? If yes, please list on an attached sheet the date removed from service, selling price and expense of sale.

Yes No

OTHER INFORMATION

		54	Did you pay any tuition & fees for yourself, spouse or dependent (including books, supplies & equipment needed for course)?
		55	Does your employer reimburse you for tuition expenses?
		56	Are you funding any college plans? - is the plan a CT 529 plan?
		57	Did you make any alimony or separate maintenance payments?
		58	Did you make any charitable contributions directly from your IRA account?
		59	Did you incur a loss due to damaged or stolen property (casualty losses)?
		60	Did you purchase, sell, or refinance your principal home or your second home, or take out a home equity loan during 2011? (If yes, please provide settlement document (HUD-1) and Form 1099-S, if applicable)
		61	If you purchased a home, was the date of purchase after April 30, 2011 and before July 1, 2011 with a binding contract signed before May 1, 2011 to purchase the home by July 31, 2011?

