2009 Tax Information Questionnaire

Name: _____

Address: _____

Email address: _____

Phone: (H)_____ (W)_____ (Cell)_____

Please provide details to all "yes" answers on next page

Yes	No		
		1	Did you receive $250 Economic Recovery Payment (ie social security, railroad retirement, veterans pension benefits, SSI)
		2	Did your marital status change during the year?
		3	Did you move or change jobs during the year?
		4	Do you have any dependents living with you or are you supporting anyone not living with you?
		5	Were there any births, adoptions, marriages, divorces, or deaths in your household or did any children cease to be your dependents in 2009?
		6	Did any of your dependent children have any income (wages, interest, etc?) (possible kiddie tax)
		7	Can you or your spouse be claimed as a dependent by someone else?
		8	Did you incur child care or dependent care expenses in 2009?
		9	Are you or any of your dependents disabled?
		10	Did your bank foreclose on your house in 2009? If so, did you go bankrupt (what chapter) or sell your house in a "short" sale?
		11	Did you have any credit card debt forgiven in 2009? Did you receive a 1099C?
		12	Did you or your spouse receive any social security benefits during the year?
		13	Did you or your spouse receive any unemployment benefits during 2009?
		14	Did you have any interest, dividend, or foreign income?
		15	During 2009, did you have an interest in, or a signature over a bank, securities, or other financial account in a foreign country, or were you a grantor of or transferor to a foreign trust?
		16	Did you receive or pay any alimony or separate maintenance payments?
		17	Did you receive any type of prize or award during 2009, including lottery or gambling winnings?
		18	Did you incur any gambling losses during 2009?
		19	Did you pay any tuition & fees for yourself, spouse or dependent (including books, supplies & equipment needed for course)?
		20	Are you funding any college plans? - is the plan a CT 529 plan?
		21	Did you cash any series EE or I U.S. Bonds that were issued after 1989 to pay for college?
		22	Did you buy, sell, or trade any assets (stocks, real estate, etc) during the year?
		23	Did you exercise any stock options in 2009?
		24	Did you withdraw money from any retirement accounts or "rollover" a retirement plan into another plan?
		25	Did you convert any retirement funds to ROTH funds?
		26	Did you incur a loss due to damaged or stolen property (casualty losses)?
		27	Did you make cash or noncash charitable contributions in 2009? (please let us know, even if you do not itemize!!)
		28	Did you pay any health, dental or LTC premiums or pay medical expenses (including prescriptions)?
		29	Did you pay mortgage interest (including home equity), and/or mortgage insurance premiums in 2009?
		30	Did you pay any real estate taxes in 2009? (please let us know even if you do not itemize….there is a new deduction in 2009!
		31	Did you purchase, sell, or refinance your principal home or your second home, or take out a home equity loan during 2009? (If yes, please provide settlement document (HUD-1) and Form 1099-S, if applicable
		32	Did you purchase a principal residence in 2009 or 2010?
		33	Any auto taxes paid in 2009? (Please provide Yr, Make & Model of Autos on next page)
		34	Did you use your vehicle on the job other than for commuting to work?
		35	Did you use an employer provided vehicle which you drove home or used personally? *?
		36	Did you pay any expenses for your job (union dues, uniforms, safety equip, etc)?

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		37	Did you work out of town at any time during 2009?
		38	Did you purchase a Hybrid in 2009?
		39	Did you make any gifts (cash or property) over $12,000 to any one person in 2009?
		40	Did you purchase energy efficient items (eg insulation, windows, ext doors, furnace, AC) or any solar property (solar electric, solar water heating, fuel cell property) in 2009?
		41	Did you pay wages of $1,600 or more in any calendar quarter this year to any one household employee? **chk limit****
		42	Do you own any rental property and therefore have rental income and expenses?
		43	Do you own a vacation home that was rented to someone else at anytime during the year?
		44	Does anyone owe you money which has become uncollectible?
		45	Did you make any large purchases (car, boat, etc.) for state sales tax deductions?
		46	Do you own a business?
		47	Did you engage in any type of bartering transactions in 2009?
		48	Did you make any estimated Federal and State tax payments during the year?
		49	Did you have any out of state purchases for which you may owe CT sales (use) tax?
		50	Were you a resident of, or did you have income in, more than one state during 2009?
		51	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?
		52	Did you receive any notices from the IRS or the State?
		53	Have you informed us of ALL your income from ALL sources? If not, please use the space at the end to list any other income.
		54	Have you provided ALL your deductions?
		55	Would you like your refund (if applicable) to be deposited directly into your bank? If so, please provide Name of Bank ______________________________ Bank Routing #____________________________ and Account Number _______________________________ and state whether this is a checking or savings account____________________.

Please use the following blank lines to list the question number to which you responded "Yes" and provide the appropriate detail.

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