

Miscellaneous Information

Name: _____

SSN: _____

Yes No

General Information

Yes	No	1. Were there any changes to your filing status or number of dependents during 2008?
Yes	No	2. Can you or your spouse be claimed as a dependent by someone else?
Yes	No	3. Did you incur any childcare expenses?
Yes	No	4. Did you have a change in residence or job location during the year?
Yes	No	5. Did you move during 2008? From where? _____ Date of move _____
Yes	No	6. Did you reside in more than one state during 2008? If yes, which states? _____
Yes	No	7. Did you receive any notices from the IRS or the state taxing agency? If yes, please attach.
Yes	No	8. Would you like a copy of your tax return sent to you via email?
Yes	No	9. Did you receive an Economic Stimulus Payment? How much? _____ If yes, please bring IRS Notice 1378 to your appointment.

Yes No

Income Information

Yes	No	1. Have you received all W-2s from all employers? How many W-2s are attached? _____
Yes	No	2. Did you use your vehicle on the job other than for commuting to work?
Yes	No	3. Did you have an employer-provided vehicle which you drove home or used personally? If so, enter the lease value. \$ _____
Yes	No	4. Did you work out of town at any time during the year?
Yes	No	5. Did you earn income from a state other than the state in which you live? If yes, what state and how much? _____
Yes	No	6. Did you or your spouse receive any tips not reported to your (or your spouse's) employer?
Yes	No	7. Did you receive any disability income during the year? \$ _____. Attach 1099-R.
Yes	No	8. Did you have an interest in or signature over a bank or brokerage account in a foreign country? Were you a grantor of or transferor to a foreign trust?
Yes	No	9. Did you earn interest from, or are you an authorized signature holder on, a foreign bank account?
Yes	No	10. Did you have any income from, or pay taxes to, a foreign country?
Yes	No	11. Did you engage in any bartering transactions during 2008?
Yes	No	12. Did you surrender any U.S. Savings Bonds during 2008?
Yes	No	13. Did you receive any state or local income tax refunds from prior years?
Yes	No	14. Do you or your spouse have any IRA accounts?
Yes	No	15. Did you recharacterize any IRAs this year?
Yes	No	16. Did you or your spouse "roll over" a profit-sharing or retirement plan distribution into another plan?
Yes	No	17. Did you receive a Schedule K-1 from a partnership, S corporation, or trust? If so, please attach.
Yes	No	18. Did you or your spouse receive any social security benefits during the year? Attach Form(s) SSA-1099.
Yes	No	19. Did you receive any type of prize, award, or gambling winnings during 2008?
Yes	No	20. Did you receive any of the following: Unemployment Income, Combat Pay, Jury Duty and/or Alimony, or Maintenance Received? If so, what and how much? _____
Yes	No	21. Did you receive any income not shown in this organizer? If so, please list. _____
Yes	No	22. Does anyone owe you money that has become uncollectible?

Comments: _____

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	Yes	No	Business Information
			1. Did you start a new business or purchase any rental property during 2008?
			2. Have you purchased any business assets (furniture, equipment, etc.) or converted any assets to business use? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, business use percentage, etc.
			3. 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.
			4. Did you own rental property? What percentage of time did you spend managing your rentals? _____
			5. Did you purchase any gasoline, diesel, or special fuels for non-highway business use?

	Yes	No	Other Information
			1. Were any tuition costs paid during 2008 (even if classes were attended in another year)?
			2. Did anyone in your household attend higher education classes in 2008?
			3. Did you incur a loss due to damaged or stolen property?
			4. Did you purchase, sell, or refinance your principal home or your second home or make a home equity loan during the year? If yes, please provide all escrow, closing, and other pertinent documentation and information.
			5. Did you purchase a home, for the first time, as a principal residence after April 8, 2008? If yes, please provide closing documentation.
			6. Did you make any gifts to any one person in 2008 in excess of \$12,000? If so, are you splitting this gift with your spouse?
			7. Did you pay wages to any household employees (babysitter, housekeeper, nanny, etc.)?

To itemize deductions, bring receipts and documentation for these types of expenses:

- Prescriptions, first-aid
- State/local income taxes
- Mortgage interest
- Tax preparation fees
- Gambling losses (up to amount of winnings)
- Cash donations to charity (provide all receipts)
- Medical/Dental/Vision expenses and insurance premiums, mileage and lodging for seeking medical care (but not meals)
- Real estate and personal property taxes paid in 2008
- Unreimbursed employee/work-related expenses (if self-employed, do not include items reported on Schedule C)
- Fair market value of property donated to charity
- Purchase price of new goods donated or used in volunteer work

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Information to bring to your appointment:

- Driver's license & social security card (for identity verification)
- Copy of your 2007 income tax return (for comparison and review for all includible information)
- Preprinted IRS label received
- Original W-2s and other statements of income received from employers
- 1099s and other statements reporting interest/dividend/miscellaneous income
- Records of other income received (tips, self-employment, SSI, combined bank reporting statements)
- Cancelled checking/savings slip (for direct deposit/direct debit information)
- IRS Notice 1378 for Economic Stimulus Payment

Concerns to discuss with preparer: _____
