

## Questions

Please check the appropriate box and include all necessary details and documentation.

**Yes    No**

### Personal Information

- Did your marital status change during the year?
- If yes, explain: \_\_\_\_\_
- Did your address change from last year?
- Can you be claimed as a dependent by another taxpayer?
- Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?

**Yes    No**

### Dependent Information

- Were there any changes in dependents from the prior year?
- If yes, explain: \_\_\_\_\_
- Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$1,900?
- Do you have dependents who must file a tax return?
- Did you provide over half the support for any other person(s) during the year?
- Did you pay for child care while you worked or looked for work?
- Did you pay any expenses related to the adoption of a child during the year?

**Yes    No**

### Purchases, Sales, and Debt Information

- Did you start a new business or purchase rental property during the year?
- Did you acquire a new or additional interest in a partnership or S corporation?
- Did you sell, exchange, or purchase any real estate during the year?
- Did you purchase or sell a principal residence during the year?
- Did you foreclose or abandon a principal residence or real property during the year?
- Did you acquire or dispose of any stock during the year?
- Did you take out a home equity loan this year?
- Did you refinance a principal residence or second home this year?
- Did you sell an existing business, rental, or other property this year?
- Did you incur any non-business bad debts this year?
- Did you have any debts canceled or forgiven this year?
- Did you purchase a new hybrid, alternative motor, or electric motor energy efficient vehicle this year?
- Did you pay any student loan interest this year?

**Yes    No**

### Income Information

- Did you have any foreign income or pay any foreign taxes during the year?
- Did you receive any income from property sold prior to this year?
- Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?
- Did you make any withdrawals from or contributions to an IRA, Keogh, SIMPLE, SEP, or other qualified retirement plan?
- Did you make any withdrawals/contributions from/to a retirement plan (including IRA) due to Midwestern Disaster area relief?
- Did you make any withdrawals from an education savings or 529 Plan account?
- Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?
- Did you receive any disability income during the year?
- Did you receive any Social Security benefits during the year?
- Did you receive any unemployment benefits during the year?
- Did you receive tip income not reported to your employer this year?
- Did any of your life insurance policies mature, or did you surrender any policies?
- Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

**Yes    No**

### Itemized Deduction Information

- Did you incur a casualty or theft loss during the year?
- Do you have evidence to substantiate charitable contributions?
- Did you make any noncash charitable contributions (clothes, furniture, etc.)?
- Did you donate a vehicle or boat during the year?
- Did you have an expense account or allowance during the year?
- Did you use your car on the job, for other than commuting?
- Did you work out of town for part of the year?

Please check the appropriate box and include all necessary details and documentation.

**Yes No**

**Itemized Deduction Information, Continued**

- Did you have any expenses related to seeking a new job during the year?
- Did you make any major purchases during the year (cars, boats, etc.)?
- Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?

**Yes No**

**Miscellaneous Information**

- Did you make gifts of more than \$13,000 to any individual?
- Did you have any educational expenses during the year?
- Did you make any contributions to an education savings or 529 Plan account?
- Did you make any contributions to a Health savings account (HSA) or Archer MSA?
- Did you pay long-term health care premiums for yourself or your family?
- Did you pay any COBRA health care coverage continuation premiums?
- Did you engage in any bartering transactions?
- Are you an active participant in a pension or retirement plan?
- Did you retire or change jobs this year?
- Did you incur moving costs because of a job change?
- Did you, your spouse, or your dependents attend a post-secondary school during the year?
- Did you pay any individual as a household employee during the year?
- Did you make energy efficient improvements to your main home this year?
- 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?
- Did you receive correspondence from the State or Internal Revenue Service?
- If yes, explain: \_\_\_\_\_
- Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.
- Did you pay state and local real estate property taxes this year?