

DID YOU OR YOUR SPOUSE LAST YEAR... (check all that apply)



- Live in any other states? Work in any other states?

If yes, list the states and the dates you lived or worked there:

- Purchase a home?
 Purchase qualified residential energy products for your home?

- Receive wages, salaries, or any other employer compensation?
- Receive W-2 forms from ALL employers you worked for last year?
- Receive unemployment compensation?
- Receive alimony?
- Receive Social Security Income?
- Pay alimony? (Name and SSN of recipient is required)
- Pay daycare expenses? (Name, address and SSN (or EIN) of provider is required)
- Receive winnings from gambling? (lottery, race track, casinos, raffles, etc.)
- Receive any miscellaneous income? (prizes, awards, jury duty, etc.) Amount and description are required
- Pay interest on student loans?
- Did you have any of the following?
 - Receive state tax refund?
 - Pay real estate taxes? \$ _____
 - Home Mortgage?
 - Medical expenses or pay for health insurance?
 - Contributions to charity, church, etc?
- Receive pension, annuity, ROTH, IRA or retirement income?
- Receive interest on savings, cash, US bonds, stock dividends?
- Do you have a Health Savings Account (HSA)?
- Did you have
 - Out-of-pocket expenses, for your students
 - Loss from casualty? (fire, theft, natural disaster, etc.)

List all W-2 Wages from Box 1 Below:

Employer Name	Wages
	\$
	\$
	\$
	\$
	\$
	\$
	\$

- Have a job-related move?
- Contribute to a:
 - ROTH IRA \$ _____ Traditional IRA \$ _____
 - SEP \$ _____ Keogh \$ _____
 - Simple Retirement Plan \$ _____
- Did you take a distribution from any retirement account?
- Pay college tuition expenses?
- Are you enrolled as a:
 - FT Student PT Student

- Sell stock, mutual fund, or other securities?
- Receive a 1099-MISC?
- Own your own business or were self-employed?

- Sell your home? Sell any other property? (equipment, land, etc.)
- Make estimated tax payments?
- Amount of estimates paid and Dates

Business Name

Proprietor Name

Date of Business Start

- Own rental property or converted rental property to personal use?
- Receive royalties?
- Operate a farm?

- Receive installment payments on property sold?
- Have an interest in a partnership, S-corporation, estate or trust?
- Have income as a minister? Receive housing allowance?

Additional Comments

All information I have given is true and correct to the best of my knowledge. Client's

Signature

Spouse's Signature

Date