

NAME: _____ **PERSONAL TAX QUESTIONNAIRE** **TAX YEAR:** _____

Please answer the following questions to determine maximum deductions:	YES	NO
1. Did your marital status change during the year?		
2. Did your address change during the year?		
3. Were there any changes in dependents?		
4. Did you receive unreported tip income of \$20 or more in any month?		
5. Did you receive any unemployment or disability income?		
6. Did you buy or sell any stocks, bonds or other investment property?		
7. Did you purchase, sell, refinance your principal home or second home, or take out a home equity loan?		
8. Did you convert part or all of your traditional/SEP/SIMPLE IRA to a ROTH IRA?		
9. Could you be claimed as a dependent on another person's tax return?		
10. Did you pay anyone for domestic services in your home?		
11. Did you pay anyone for childcare services?		
12. Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?		
13. Did you give a gift of more than \$13,000 to one or more people?		
14. Did you go through bankruptcy, foreclosure, or repossession proceedings?		
15. Did you incur a loss because of damaged or stolen property?		
16. Were you notified or audited by either the IRS or State taxing agency?		
17. Did you work from a home office or use your car for business?		
18. May the IRS discuss your tax return with your preparer?		
19. Were you a citizen of, have income from, or live in a foreign country?		
20. Do you want to electronically file your tax return?		
21. Do you buy any internet merchandise for which you did not pay sales/use tax?		
22. Do you have any Foreign bank accounts?		
23. Did you maintain a written log or document for your business use of auto mileage?		
24. Did you receive the Economic Recovery Payment in 2010?		

Signature: _____ Date: _____

Note: If you answered YES to any of the above, please provide further details.