

# 2009 EZ Questionnaire

# Advisor Tax Services

T = Taxpayer      S = Spouse

Name (T) \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Name (S) \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Phone: home \_\_\_\_\_ work (T) \_\_\_\_\_ cell (T) \_\_\_\_\_

work (S) \_\_\_\_\_ cell (S) \_\_\_\_\_

Email: (T) \_\_\_\_\_ @ \_\_\_\_\_ (S) \_\_\_\_\_ @ \_\_\_\_\_

Mailing address: \_\_\_\_\_

Physical address (if different than mailing): \_\_\_\_\_

## Please circle Y or N for all items below

Y N own real estate

Y N have children or other dependents

Y N received income reported on forms other than W2, 1099-INT, 1099-G or 1099-SSA

Y N received income in cash or “under-the-table” payments for services provided

Y N received income from alimony, jury duty, lawsuits, unreported tips, awards or prizes

Y N received income from investments such as stocks, bonds or mutual funds

Y N received a distribution from an IRA, 401k or other retirement plan

Y N contributed to or received a distribution from a Health Savings Account (HSA)

Y N paid college tuition either directly or with student loans

## If you answered Yes to any of the above STOP and use our standard 2009 Questionnaire

Y N received an “economic recovery” rebate of \$250

Y N received correspondence from the IRS or state (other than refunds)

Y N bought items out of state or over the internet for which you paid no sales tax

Y N wish to contribute to the Vermont Nongame Wildlife Fund and/or Children’s Trust Fund

Y N have or plan to contribute to a regular (not Roth) IRA

Y N paid interest on student loans (reported on form 1098-E)

Y N paid sales tax on the purchase of a new auto, truck or motorcycle after Feb. 16, 2009

Y N made estimated tax payments (federal or state – other than withholding from wages)

Y N taxpayer/spouse in military

Y N contributed to retirement plan or flexible spending account (FSA) thru payroll deduction

Y N participated in employee stock purchase plan

Y N received an inheritance or gift of money or other assets

Y N received a loan from a relative or friend that you have to pay back

Y N declared bankruptcy or insolvency in the past

Y N have health insurance: if yes, how paid for? (check all that apply)

\_\_\_ out of pocket \_\_\_ employer \_\_\_ COBRA \_\_\_ Catamount \_\_\_ VHAP \_\_\_ other

How many of the following income forms do you have?

\_\_\_\_\_ W2 (wages)

\_\_\_\_\_ 1099-G (unemployment compensation or state tax refund)

\_\_\_\_\_ 1099-INT (interest)

\_\_\_\_\_ 1099-SSA (social security)

Y N have you received any other types of tax forms? If yes, list here \_\_\_\_\_

Y N do you have any tax questions? \_\_\_\_\_