

2011 EZ Questionnaire

Advisor Tax Services

T = Taxpayer S = Spouse

Prior clients need only enter information that changed since last year

Name (T) _____ Signature _____ Date ___/___/___

Name (S) _____ Signature _____ Date ___/___/___

Birthdate: (T) ___/___/___ (S) ___/___/___ Occupation: (T) _____ (S) _____

Phones: home _____ work (T) _____ work (S) _____

Use texting on cell ? Y N cell (T) _____ cell (S) _____

Email: (T) _____ @ _____ (S) _____ @ _____

Mailing address: _____

Physical address (if different than mailing): _____

Please check 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 self-employment or independent contractor income (may be on 1099-MISC)
- Y N received income in cash or "off-the-books" payments for any services provided
- Y N received income from alimony, jury duty, lawsuits, awards, prizes, scholarships or grants
- 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 reported on 1099-R
- 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 you may need to use our 2011 standard Questionnaire

- Y N received cash tips that were not reported to employer; if yes, how much \$ _____
- Y N received correspondence in the past year 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 donate to the VT Nongame Wildlife Fund, Veteran's and/or Children's Trust Fund
- Y N have contributed or plan to contribute to a regular (not Roth) IRA before 4/15/2011
- Y N paid interest on student loans (reported on form 1098-E)
- 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 ___ payroll deduction ___ employer ___ COBRA ___ Catamount/VHAP ___ other

How many of the following income forms do you have?

- _____ W2 (wages)
- _____ 1099-G (unemployment compensation and/or state tax refund)
- _____ 1099-INT (interest)
- _____ 1099-SSA (social security or SSDI)

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

Y N do you have any tax questions? _____