

2009 Questionnaire

Advisor Tax Services

T = taxpayer S = spouse

Name (T) _____ Signature _____ Date ___/___/___
Name (S) _____ Signature _____ Date ___/___/___
Phone: home _____ work (T) _____ work (S) _____ cell (T) _____ cell(S) _____
Email: (T) _____ @ _____ (S) _____ @ _____

New mailing address? _____

Physical address (if different than mailing) _____

Change in marital status? ___ married ___ divorced ___ widowed ___ separated Date ___/___/___

New dependents? (If yes, list below) **Do not write SS#, provide verbally or in person**

Name (first, initial, last)	Relationship	Birthday	% support	# days lived with you
_____	_____	___/___/___	_____	_____
_____	_____	___/___/___	_____	_____

List all members of household other than spouse or dependents and number of months they lived with you (relatives, significant other, roommates, etc.)

Name _____	Months _____	Name _____	Months _____
Name _____	Months _____	Name _____	Months _____

Please circle Y or N for all questions below (provide all supporting documentation)

- Y N received an "economic recovery" rebate of \$250 (generally for recipients of social security or veteran benefits)
- Y N received correspondence (other than refunds) from the IRS or state (provide copies of all letters)
- Y N made estimated tax payments (Federal or state – other than withholding from wages or retirement plans)
- Y N bought items out of state or over the internet for which you paid no sales tax (sales tax is due to your resident state!)
- Y N claiming an exemption for a child or parent not living with you more than 1/2 of year (ex. college student)
- Y N have shared custody of 1 or more dependent children: if yes, do children spend more than 1/2 year with you? Y N
- Y N removing an exemption for a dependent claimed last year: name _____
- Y N 1 or more dependent children have income: if yes, did they have investment income greater than \$1,900? Y N
- Y N purchased a new auto, truck, motorcycle or motorhome: if yes, sales tax paid = \$ _____
- Y N purchased other big ticket item (car, boat, RV, housing materials, etc.) if yes, total sales tax paid = \$ _____
- Y N purchased a primary home: if yes, first home? Y N date occupied ___/___/___ (provide settlement statement)
- Y N purchased or sold any other real estate (provide settlement statement)
- Y N refinanced a mortgage/took a home equity loan: if yes, what were proceeds used for? _____
- Y N had a mortgage foreclosed or sold property in a "short" sale (provide 1099-A, 1099-C and/or settlement statement)
- Y N made energy efficient improvements to primary home (provide amounts & manufacturers certification statement)
- Y N have health insurance: if yes, how paid? ___ out of pocket ___ employer ___ COBRA ___ Catamount ___ VHAP ___ other
- Y N wish to contribute to the Vermont Nongame Wildlife Fund \$ _____ and/or Vermont Children's Trust Fund \$ _____
- Y N new occupation _____ Y N paid child support (provide name / SS# of recipient)
- Y N taxpayer/spouse in military (provide copies of all LES) Y N paid alimony (provide name / SS# of recipient)
- Y N taxpayer/spouse is legally blind Y N paid un-reimbursed K-12 teacher expenses
- Y N own a second home, camp, RV, boat or land Y N paid expenses to adopt a child
- Y N own rental property (use separate organizer) Y N have or plan to convert a regular IRA to a Roth
- Y N self-employed/have own business (use separate organizer) Y N contributed to HSA, MSA or FSA (form 5498-SA)
- Y N use/rent part of home for business (use separate organizer) Y N withdrew funds from HSA, MSA or FSA
- Y N contribute to retirement plan thru payroll deduction Y N received dependent care benefits from work
- Y N have or plan to contribute to any kind of IRA Y N paid for child or disabled dependent care

(continue on other side)

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|------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| Y N paid un-reimbursed moving expenses due to job change | Y N paid foreign taxes (can occur in brokerage account) |
| Y N paid interest on a student loan (Form 1098-E) | Y N have foreign income, accounts or assets |
| Y N paid interest on a mortgage (Form 1098) | Y N have joint account with a non-spouse |
| Y N paid property taxes (provide property tax bills) | Y N have an uninsured loss (fire, theft, flood, etc.) |
| Y N paid college tuition (Form 1098-T) | Y N victim of investment theft (ex. Madoff) |
| Y N contributed to state tuition savings program (529 plan) | Y N own stock that is worthless (ex. Enron) |
| Y N made charitable contributions (<u>must</u> have receipts) | Y N have carryover capital losses or NOL |
| Y N participated in employee stock purchase plan | Y N received a gift of money, investments or assets |
| Y N exercised a stock option at work | Y N made a gift of money, investments or assets |
| Y N used an employer vehicle for personal purposes | Y N declared bankruptcy or insolvency |
| Y N employed a live-in nanny, housekeeper, caretaker, etc. | Y N became executor or trustee of an estate or trust |
| Y N received an inheritance | Y N have a will and/or trust |
| Y N inherited an IRA, 401(k) or other retirement plan | Y N have executed an advance directive for health care |
| Y N received a loan from relative or friend | |
| Y N loaned money to someone else: if yes, are they paying interest? Y N (provide name, address, SS# & amounts) | |
| Y N purchased a hybrid, electric, lean-burn or other qualifying alternative motor vehicle (including golf carts) | |

For the following types of income circle Y or N and if Y, enter # of forms received to left of each item

- | | |
|--------------------------------------------------------|----------------------------------------------|
| ___ Y N W2 (wages) | ___ Y N 1099-INT (interest) |
| ___ Y N W2G (gambling/lottery) | ___ Y N 1099-DIV (dividends) |
| ___ Y N 1099-MISC (self employment/other income) | ___ Y N 1099-B (sale of stocks, bonds, etc.) |
| ___ Y N 1099-G (state tax refund/unemployment comp.) | ___ Y N 1099-S (sale of real estate) |
| ___ Y N 1099-SSA (social security, SSDI) | ___ Y N 1099-SA (HSA/MSA distribution) |
| ___ Y N 1099-R (retirement, IRA, 401k, etc.) | ___ Y N 1099-Q (529 plan distribution) |
| ___ Y N 1099-LTC (long term care insurance income) | ___ Y N 1099-A or C (cancellation of debt) |
| ___ Y N Form K1 (trust, estate, partnership, S corp.). | |

For following types of income circle Y or N and if Y, write in amounts received

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|--------------------------------------------------------------------------------------------|------------------------------------------|
| Y N Cash or "under the table" payments for services provided: Type of service _____ | \$ _____ |
| Y N Child support payments received from Name: _____ | \$ _____ |
| Y N Alimony payments received from Name: _____ | \$ _____ |
| Y N PATH, RUFA or other state payments | \$ _____ |
| Y N Adult foster care (difficulty of care payments) | \$ _____ |
| Y N Scholarships, fellowships or grants not used for degree candidate's education expenses | \$ _____ |
| Y N Insurance proceeds or lawsuit settlement (not reimbursements) | \$ _____ |
| Y N Sick or disability pay not reported on a W2 \$ _____ | Y N Foster care \$ _____ |
| Y N SSI benefits (not reported on 1099-SSA) \$ _____ | Y N Veteran benefits \$ _____ |
| Y N Value of awards or prizes (not on W2G) \$ _____ | Y N Jury duty \$ _____ |
| Y N Workers compensation \$ _____ | Y N Estate executor \$ _____ |
| Y N Royalties not reported on 1099-MISC \$ _____ | Y N Unreported tips \$ _____ |
| Y N Installment sales (provide list of principal & interest payments) | Y N Hobbies (provide details separately) |
| Y N Foreign sources (provide details including any taxes paid) | Y N Farm (provide details separately) |
| Y N Do you expect any substantial changes in the coming year? | If yes, provide brief explanation: |

Y N Do you have any tax questions? _____
