

## Questions

Please check the appropriate box and include all necessary details and documentation.

Name of Tax Client (print) \_\_\_\_\_

	Yes	No
<b>Personal Information</b>		
Did your marital status change during the year?	p	p
If yes, explain: _____		
Did your address change from last year?	p	p
Can you be claimed as a dependent by another taxpayer?	p	p
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	p	p
Do you own or rent your home? (Only needed if filing Schedule A or Real Estate/Rent Rebate)		
<input type="checkbox"/> Own - Please include your <b>RECEIPTED</b> Real Estate Taxes for County?Municipal ( <i>Spring</i> ) & School ( <i>Fall</i> ).		
<input type="checkbox"/> Rent		
<b>Dependent Information</b>		
Were there any changes in dependents from the prior year?	p	p
If yes, explain: _____		
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$1,900?	p	p
Do you have dependents who must file a tax return?	p	p
Did you provide over half the support for any other person(s) during the year?	p	p
Did you pay for child care while you worked or looked for work?	p	p
Did you pay any expenses related to the adoption of a child during the year?	p	p
If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	p	p
<b>Purchases, Sales and Debt Information</b>		
Did you start a new business or purchase rental property during the year?	p	p
Did you acquire a new or additional interest in a partnership or S corporation?	p	p
Did you sell, exchange, or purchase any real estate during the year?	p	p
Did you purchase or sell a principal residence during the year?	p	p
Did you foreclose or abandon a principal residence or real property during the year?	p	p
Did you acquire or dispose of any stock during the year?	p	p
Did you take out a home equity loan this year?	p	p
Did you refinance a principal residence or second home this year?	p	p
Did you sell an existing business, rental, or other property this year?	p	p
Did you incur any non-business bad debts this year?	p	p
Did you have any debts canceled or forgiven this year?	p	p
Did you purchase a new hybrid, alternative motor, or electric motor energy efficient vehicle this year?	p	p
Did you pay any student loan interest this year?	p	p
<b>Income Information</b>		
Did you have any foreign income or pay any foreign taxes during the year?	p	p
Did you receive any income from property sold prior to this year?	p	p
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	p	p
Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401k, or other qualified retirement plan?	p	p
Did you make any withdrawals from an education savings or 529 Plan account?	p	p

	Yes	No
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	p	p
Did you receive any Social Security benefits during the year?	p	p
Did you receive any unemployment benefits during the year?	p	p
Did you receive any disability income during the year?	p	p
Did you receive tip income not reported to your employer this year?	p	p
Did any of your life insurance policies mature, or did you surrender any policies?	p	p
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	p	p

### Itemized Deduction Information

Did you incur a casualty or theft loss during the year?	p	p
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	p	p
Do you have evidence to substantiate charitable contributions?	p	p
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	p	p
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C.	p	p
Did you have an expense account or allowance during the year?	p	p
Did you use your car on the job, for other than commuting?	p	p
Did you work out of town for part of the year?	p	p
Did you have any expenses related to seeking a new job during the year?	p	p
Did you make any major purchases during the year (cars, boats, etc.)?	p	p

### Miscellaneous Information

<b>Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?</b>	p	p
If yes, complete Use Tax worksheet or Table 1. For more information or too see the worksheet and table, visit <a href="http://www.brenneraccounting.com/2012TaxSeason">www.brenneraccounting.com/2012TaxSeason</a> .		
Did you make gifts of more than \$13,000 to any individual?	p	p
Did you have any educational expenses during the year?		
Did you make any contributions to an education savings or 529 Plan account?	p	p
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	p	p
Did you pay long-term health care premiums for yourself or your family?	p	p
Did you pay any COBRA health care coverage continuation premiums?	p	p
If you are a business owner, did you pay health insurance premiums for your employees this year?	p	p
Did you utilize an area of your home for business purposes?	p	p
Did you engage in any bartering transactions?	p	p
Are you an active participant in a pension or retirement plan?	p	p
Did you retire or change jobs this year?	p	p
Did you incur moving costs because of a job change?	p	p
Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?	p	p
Did you pay any individual as a household employee during the year?	p	p
Did you make energy efficient improvements to your main home this year?	p	p
Were you a grantor or transferor for a foreign trust, or do you have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?	p	p
Did you receive correspondence from the State or the Internal Revenue Service ?	p	p
If yes, explain: _____		
Do you want to designate \$3 to the Presidential Election Campaign Fund?		
If you check yes, it will not change your tax or reduce your refund.	p	p

X \_\_\_\_\_ Date \_\_\_\_\_

I declare that I have answered the questions above, and to the best of my knowledge and belief, they are true, correct, and complete.