

General Questions

Please check if "Yes" and provide documentation, if possible.

- 1. Has your marital status changed?
- 2. Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 20__?
- 3. Have you been notified by the IRS of changes to a prior year's return, or received any other tax correspondence?
- 4. Are you being claimed as a dependent by another person?
- 5. Are there any changes in the dependent information from the prior year?
- 6. Did you have any children under 19 (or 24 if a full time student) who received more than \$1,100 in investment income?
- 7. Do you have dependents who are neither U.S. citizens nor U.S. residents?
- 8. Did you provide over half of the support for another person (or persons) during the year?
- 9. Did you purchase or sell a principal residence?
- 10. Did you receive payments from a pension or profit sharing plan?
- 11. Did you receive any distributions from an IRA or other qualified plan?
- 12. Did you receive any disability income?
- 13. Did you receive any foreign income or pay any foreign taxes?
- 14. Did you receive interest from a bank account or other financial account based in a foreign country?
- 15. Were you the grantor of or transferor to a foreign trust?
- 16. Were either you or your spouse enlisted in the military or National Guard?
- 17. If you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?
- 18. Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 20__?
- 19. Did you claim a First-time Homebuyer Credit for a home purchased in 2008?
- 20. Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?
- 21. Did you receive proceeds from an installment sale?
- 22. Did you make a loan at an interest rate below market rate?
- 23. Did you make gifts of more than \$15,000 to any one person?
- 24. Were there any changes to a prior year's income, deductions, or credits?
- 25. Did your employer pay premiums on life insurance in excess of \$50,000?
- 26. Were any payments made on student loans?
- 27. Did you pay any educational tuition or fees for you or a dependent?
- 28. Did you purchase a 'clean fuel' or electric hybrid vehicle in 20__?
- 29. Did you refinance a mortgage or take out a home equity loan?
- 30. Were any contributions made to a traditional or Roth IRA for 20__?
- 31. Did you make any contributions to HSA (Health Savings Account) in 20__?
- 32. Did you or a member of your family have minimum essential coverage in 20__? (The entity that provided the coverage may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled in minimum essential coverage and shows their months of coverage.)

Business and Investment Questions

- 1. Did you receive stock from a stock bonus plan with your employer?
- 2. Did you buy or sell any bonds?
- 3. Did you surrender any U.S. savings bonds?
- 4. Did you suffer a casualty, theft or condemnation?
- 5. Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S-corporations?
- 6. Did you own any investments for which you were not personally at-risk?
- 7. Did you own any interest in a Real Estate Mortgage Investment Conduit (REMIC)?
- 8. Did you sell any property or equipment on installments?
- 9. Did you incur any business-related educational expenses?
- 10. Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official?
- 11. Did you purchase any special fuels for non-highway use?
- 12. Did you make any contributions to a Keogh or a self-employed SEP, SIMPLE or Qualified plan?