

TAX YEAR 2011 Questionnaire

Please be sure to complete this questionnaire and return it to us. This will speed up processing of your return

	Yes	No	
Personal Information			
Did your marital status change during the year?	<input type="checkbox"/>	<input type="checkbox"/>	
If yes, explain: _____			
Did your address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>	
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>	
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?	<input type="checkbox"/>	<input type="checkbox"/>	New Bank Information
Dependent Information			
Were there any changes in dependents from the prior year?	<input type="checkbox"/>	<input type="checkbox"/>	birth certificate & SS card copy
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 \$1900?	<input type="checkbox"/>	<input type="checkbox"/>	Kiddie tax may be needed
Do you have dependents who must file a tax return?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you provide over half the support for any other person(s) during the year?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you pay for child care while you worked or looked for work?	<input type="checkbox"/>	<input type="checkbox"/>	statement from provider
Did you pay any expenses related to the adoption of a child during the year?	<input type="checkbox"/>	<input type="checkbox"/>	all invoices
Purchases, Sales and Debt Information			
Did you start a new business or purchase rental property during the year?	<input type="checkbox"/>	<input type="checkbox"/>	Contract or HUD statement
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>	Contract
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>	1099S
Did you purchase or sell a principal residence during the year?	<input type="checkbox"/>	<input type="checkbox"/>	1099S
Did you foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>	<input type="checkbox"/>	1099A or C
Did you acquire or dispose of any stock during the year? I need the basis	<input type="checkbox"/>	<input type="checkbox"/>	1099 B and basis
Did you take out a home equity loan this year?	<input type="checkbox"/>	<input type="checkbox"/>	1098
Did you refinance a principal residence or second home this year?	<input type="checkbox"/>	<input type="checkbox"/>	HUD statement
Did you sell an existing business, rental, or other property this year?	<input type="checkbox"/>	<input type="checkbox"/>	Contract
Did you incur any non-business bad debts this year?	<input type="checkbox"/>	<input type="checkbox"/>	Contracts or other proof
Did you have any debts canceled or forgiven this year?	<input type="checkbox"/>	<input type="checkbox"/>	1099C
Did you pay any student loan interest this year?	<input type="checkbox"/>	<input type="checkbox"/>	1098E
Income Information			
Did you have any foreign income or pay any foreign taxes during the year?	<input type="checkbox"/>	<input type="checkbox"/>	W2 or 1099Misc
Did you receive any income from property sold prior to this year?	<input type="checkbox"/>	<input type="checkbox"/>	Contract
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	<input type="checkbox"/>	<input type="checkbox"/>	1099R
Did you make any withdrawals from or contributions to an IRA, Keogh, SIMPLE, SEP, or other qualified retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>	1099R
Did you have any gambling income?	<input type="checkbox"/>	<input type="checkbox"/>	W2G
Did you make any withdrawals from an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>	1099
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	<input type="checkbox"/>	<input type="checkbox"/>	1099
Did you receive any Social Security benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>	SSA-1099
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>	1099G
Did you receive any disability income during the year?	<input type="checkbox"/>	<input type="checkbox"/>	W2 or SSA1099
Did you receive tip income not reported to your employer this year?	<input type="checkbox"/>	<input type="checkbox"/>	Your statement
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	<input type="checkbox"/>	<input type="checkbox"/>	1099Int
Did you receive any sub contractor income	<input type="checkbox"/>	<input type="checkbox"/>	1099Misc

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Itemized Deduction Information			
Did you incur a casualty or theft loss during the year?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have evidence to substantiate charitable contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	Receipt from organization
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C.	<input type="checkbox"/>	<input type="checkbox"/>	
Did you have an expense account or allowance during the year?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you use your car on the job, for other than commuting?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you work out of town for part of the year?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you have any expenses related to seeking a new job during the year?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you make any major purchases during the year (cars, boats, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	
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?	<input type="checkbox"/>	<input type="checkbox"/>	

Miscellaneous Information

Did you make gifts of more than \$13,000 to any individual?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you have any educational expenses during the year?	<input type="checkbox"/>	<input type="checkbox"/>	1098T
Did you make any contributions to an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you pay long-term health care premiums for yourself or your family?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you pay any COBRA health care coverage continuation premiums?	<input type="checkbox"/>	<input type="checkbox"/>	
Are you an active participant in a pension or retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you retire or change jobs this year?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you incur moving costs because of a job change?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you, your spouse, or your dependents attend a post-secondary school during the year?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you make energy efficient improvements to your main home this year?	<input type="checkbox"/>	<input type="checkbox"/>	Invoice
Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?	<input type="checkbox"/>	<input type="checkbox"/>	
Did you receive correspondence from the State or the Internal Revenue Service? If yes, explain: _____	<input type="checkbox"/>	<input type="checkbox"/>	
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.	<input type="checkbox"/>	<input type="checkbox"/>	
Did you pay state and local real estate property taxes this year? If yes, please attach a supporting statement.	<input type="checkbox"/>	<input type="checkbox"/>	
Do you Have Health Insurance? If yes please send your form 1099HC MA Only	<input type="checkbox"/>	<input type="checkbox"/>	
Did you pay rent? How much _____	<input type="checkbox"/>	<input type="checkbox"/>	
Do you use the Mass Turnpike or MBTA for commuting? How much did you pay?	<input type="checkbox"/>	<input type="checkbox"/>	

Personal Information Review:

Please print your name(s) _____

Current Address _____

Home phone number _____ Best E Mail Address _____

Work number(s)(h) _____ (w) _____

Cell Number(s) (h) _____ (w) _____

How would you like to receive Tax News and Tips in the future? Mail _____ Email _____