

## Question naire

**Important: Please check the appropriate box and include all necessary details.  
Use additional sheet to expound on an answer if necessary.**

Yes      No

### Health Care Information (Affordable Care Act)

*If you were covered by health insurance, you **MUST** provide us with new tax Form 1095, or complete the enclosed blue health care coverage sheet. Form 1095 reporting has been delayed until March 31st, so please do not wait on this form to get us your tax information.*

### Personal and Dependent Information

Did your marital status change during the year? If yes, explain _____	p	p
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 will be used to direct deposit your tax refund?	p	p
Were there any changes in dependents from the prior year? If yes, explain _____	p	p
Do you have any children under age 19 OR a full-time student under age 24, with unearned income (int, div, cap gains) in excess of \$1,050?	p	p
Do you have dependents who must file a tax return, especially college students? If yes, we highly recommend the parent's tax return is completed first.	p	p
Did you provide over half the support for any other person(s) other than your dependent children 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

### Purchases, Sales and Debt Information

Did you start, purchase or sell a business or 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 (incl. residence) during the year?	p	p
Did you foreclose or abandon a principal residence or real property during the year?	p	p
Did you sell any stock during the year? ( <b>PLEASE</b> provide dates acquired/cost basis.)	p	p
Did you take out a home equity loan or refinance a 1st or 2nd home this year? (Please provide a copy of the closing or settlement statement.)	p	p
Did you incur any non-business bad debts during the year?	p	p
Did you have any debts cancelled/forgiven during the year (Form 1099-C or 1099-A)?	p	p

### Income Information

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 a retirement plan?	p	p
Did you receive any distributions from a Health Savings Account (HSA) during the year?	p	p
Did you receive any disability income during the 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
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	p	p
Do you expect a large fluctuation in income, deductions, or withholding next yr?	p	p

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### Itemized Deduction Information

	<u>Yes</u>	<u>No</u>
Did you incur a casualty or theft loss during the year? (Over 10% of income?)	<input type="radio"/>	<input type="radio"/>
Do you have evidence to substantiate all charitable contributions?	<input type="radio"/>	<input type="radio"/>
Did you make any noncash charitable contributions (clothing, furniture, etc.)?	<input type="radio"/>	<input type="radio"/>
Did you use your car on the job, for other than commuting to/from work?	<input type="radio"/>	<input type="radio"/>
Did you work out of town for part of the year? If yes, please explain below. Explain: _____	<input type="radio"/>	<input type="radio"/>
Did you have any expenses related to seeking a new job during the year?	<input type="radio"/>	<input type="radio"/>
Did you make any major purchases during the year (cars, boats, etc.)?	<input type="radio"/>	<input type="radio"/>

### Miscellaneous Information

Did you make gifts of more than \$14,000 to any individual?	<input type="radio"/>	<input type="radio"/>
Did you make any contributions to a retirement plan <u>other than</u> through your employer?	<input type="radio"/>	<input type="radio"/>
Did you make any contributions to a Health Savings Account (HSA) or med svgs acct?	<input type="radio"/>	<input type="radio"/>
Did you pay long-term care/nursing home premiums for yourself or your family?	<input type="radio"/>	<input type="radio"/>
Did you potentially have medical out of pocket costs exceeding 10% of your income?	<input type="radio"/>	<input type="radio"/>
Did you engage in any bartering transactions?	<input type="radio"/>	<input type="radio"/>
Did you pay any individual as a household employee during the year?	<input type="radio"/>	<input type="radio"/>
Did you make any energy efficient improvements to your main home this year?	<input type="radio"/>	<input type="radio"/>
Do you have any foreign financial accounts, assets, or interest in a foreign entity? (Foreign asset question should be taken seriously due to potential penalties.)	<input type="radio"/>	<input type="radio"/>
Did you receive correspondence from the State or the Internal Revenue Service? If yes, explain: _____	<input type="radio"/>	<input type="radio"/>
Do you want to allocate \$3 to the Presidential Election Campaign Fund?	<input type="radio"/>	<input type="radio"/>

### Educational Expenses

Did you make any contributions/withdrawals to/from a 529 Plan or similar account?	<input type="radio"/>	<input type="radio"/>
Did you pay any student loan interest this year?	<input type="radio"/>	<input type="radio"/>
Did you incur any college education expenses for you or your dependents? (PLEASE include any Form 1098-T forms showing tuition, scholarships, etc.)	<input type="radio"/>	<input type="radio"/>

### State of Michigan Information

**Michigan Property Tax Credit:** If you are potentially eligible for this credit (it was severely limited in the 2012 tax act), please supply us with your current year summer and winter property tax bills.

**"Use Tax":** Did you make any purchases from out-of-state businesses that you might still owe Michigan sales tax on (generally required for internet purchases, for example)?    
If yes, please enter the amount of purchases \$ \_\_\_\_\_

### Annual Question Contest (Prize for the best answer)

*If you were given the resources to develop and market any "app" for cell phones, what would it be and what would it do? You can give it a name as well if you want.*

Please answer in the space below. The winning answer (most likely of the humorous variety) as chosen by our staff after tax season will win a \$50 gift certificate.

ANSWER BELOW: