**2013 TAX QUESTIONAIRE**

E-mail address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Telephone Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

College Social Security

Name Relationship Student Date of Birth Number\_\_\_\_

**TAXPAYER**:\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_ \_\_\_\_ \_\_\_N/A\_\_\_\_\_\_ \_\_\_\_/\_\_\_\_/\_\_\_\_ \_\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_\_\_

**SPOUSE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­\_** \_\_ \_N/A\_\_\_\_\_\_ \_\_\_\_/\_\_\_\_/\_\_\_\_ \_\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_\_\_

**DEPENDENTS**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_/\_\_\_\_/\_\_\_\_ \_\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_/\_\_\_\_/\_\_\_\_ \_\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_\_\_

**CURRENT ADDRESS**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

**IF YOU WOULD LIKE YOUR REFUNDS (IF ANY) PAID BY DIRECT DEPOSIT, PLEASE COMPLETE THE FOLLOWING:**

Bank Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Mark One) Checking \_\_\_\_\_\_\_ Savings \_\_\_\_\_\_\_

Bank routing number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Account number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please answer the following questions.

YES NO

\_\_\_\_ \_\_\_\_ 1. Did you purchase or sell your principal residence during the year?

\_\_\_\_ \_\_\_\_ 2. Have you been notified by the IRS of changes to a prior year’s return, or received any other tax

correspondence?

\_\_\_\_ \_\_\_\_ 3. Did you receive, or expect to receive, a Schedule K-1 from a trust, estate, partnership, or

S Corporation?

\_\_\_\_ \_\_\_\_ 4. Did you own an interest in a partnership or S Corporation?

\_\_\_\_ \_\_\_\_ 5. Did you receive any unemployment benefits?

\_\_\_\_ \_\_\_\_ 6. Did you receive any distributions from a retirement plan?

\_\_\_\_ \_\_\_\_ 7. Did you “rollover” a retirement plan distribution into another plan?

\_\_\_\_ \_\_\_\_ 8. Did you receive Social Security benefits or disability income?

\_\_\_\_ \_\_\_\_ 9. Did you sell any personal assets at a gain (ie, car, boat, etc.)?

\_\_\_\_ \_\_\_\_ 10. Did you sell any real estate (other than your home) during the year?

\_\_\_\_ \_\_\_\_ 11. Did you receive proceeds from a prior year installment sale?

\_\_\_\_ \_\_\_\_ 12. Did you own any rental property during the year?

\_\_\_\_ \_\_\_\_ 13. Did you start or acquire a new business or rental property?

\_\_\_\_ \_\_\_\_ 14. Did you sell any part of an existing business, or sell business assets?

\_\_\_\_ \_\_\_\_ 15. Did you cease operating any business or rental property during the year?

\_\_\_\_ \_\_\_\_ 16. Did you use part of your home for business purposes?

\_\_\_\_ \_\_\_\_ 17. Do you pay for any health or long term care insurance through your business?

\_\_\_\_ \_\_\_\_ 18. Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2013?

\_\_\_\_ \_\_\_\_ 19. Did you make any contributions to HSA (Health Savings Account) in 2013?

\_\_\_\_ \_\_\_\_ 20. Did you pay expenses for the care of your child or other dependent so you could work?

\_\_\_\_ \_\_\_\_ 21. Did you lose property or have damage to a property due to a casualty, theft, or condemnation?

\_\_\_\_ \_\_\_\_ 22. Did you pay any educational tuition or fees?

\_\_\_\_ \_\_\_\_ 23. Did you pay any student loan interest?

\_\_\_\_ \_\_\_\_ 24. Did you make any federal or state estimated payments?

\_\_\_\_ \_\_\_\_ 25. Did you have any stock transactions during the year?

\_\_\_\_ \_\_\_\_ 26. Did you make any payments in 2013 that would require you to file Form(s) 1099?

I declare that, to the best of my knowledge and belief, I have answered the above listed questions truthfully and completely.

SIGNATURE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_