

Miscellaneous Information

Name: _____

Date: _____

Yes	No	Question
		Did any births, adoptions, marriages, divorces, or deaths occur in your family during the year?
		Can you or your spouse be claimed as a dependent by someone else?
		Have you received any disability income during the year? \$_____ Source? _____
		Did you or your spouse receive any social security benefits during the year? Please attach Form(s) SSA-1099
		Did you have a change in residence or job location during the year? If Yes, When? And Where to Where?
		Did you use your vehicle on the job other than for commuting to work?
		Did you have an employer-provided vehicle which you Drove home or used personally? If so, enter the lease value \$_____
		If you were to receive an economic stimulus check in 2008, did you receive it? If so, what was the amount? \$_____
		Did you start a new business or purchase any rental property during 2008?
		Did you purchase, sell, or refinance your principal home or your second home or make a home equity loan during the year? If yes, please bring escrow papers and other pertinent information.
		Have you purchased any business assets (furniture, equipment, etc.) or converted any assets to business use? If yes, please list on a separate sheet. Also, bring escrow papers for purchase of real estate.
		Did you dispose of any business assets (including real estate)? If yes list on a separate sheet.
		Did you receive any correction notices from the IRS or the state? If yes, please attach.
		Did you receive unemployment compensation during 2008?
		Did you purchase any large ticket items (car, boat, R.V., etc.) that you were required to pay sales tax on?
		Did you surrender any U.S. Savings Bonds during 2008?
		Did you pay real estate taxes on your property during 2008? Please provide data.
		Are you a first-time homebuyer in 2008? Please provide closing documents.
		Did you or your spouse "roll over" a profit-sharing or retirement plan distribution into another plan?
		Did you make any gifts over \$12,000 to any one person in 2008?
		Did you or your spouse pay any Long Term Care insurance premiums in 2008?
		If there is a refund, would you like a Direct Deposit done? If so please give routing and account number.
		If you owned rental property, what percentage of time did you spend managing your rentals? _____
		Did you have any household employees? (babysitter, housekeeper, nanny, etc.)
		Do you or your spouse have any IRA accounts?
		Did you re-characterize any IRAs to a Roth IRA this year?
		Did you have childcare expenses?
		Do you need any investment advice?
		Did you make any contributions to an Ohio 529 plan in 2008?
		Have you verified that your dependents have not claimed themselves on their own tax return for 2008?

*** We only accept cash or check. We do not take credit cards. Payment is due upon pickup of tax returns. ***

Comments: _____

Email Addresses? _____