

Required Information

Name: _____

Date: _____

| Yes | No | |
|-----|----|--|
| | | 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 verified that your dependents have not claimed themselves on their own tax return for 2009? |
| | | Did you have any debts canceled, forgiven or refinanced during 2009? |
| | | Did you have a change in residence or job location during the year? If Yes, When? And Where to Where? |
| | | Did you make estimated income tax prepayments during 2009? (Circle those that apply) Federal? State? City? |
| | | Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters? |
| | | Have you received any gambling winnings during 2009? If so, do you have documented offsetting losses? Yes / No |
| | | Did you start a new business or purchase any rental property during 2009? |
| | | Did you purchase, sell, or refinance your principal or second home? Did you open a home equity loan during the year? If yes, please bring escrow papers and other pertinent information. |
| | | Did you surrender any U.S. Savings Bonds during 2009? |
| | | Did you pay tuition on a post-secondary education for yourself or a family member? If so, how much? |
| | | Did you receive any correction notices from the IRS or the state for a prior year return? If yes, please attach. |
| | | Did you receive unemployment compensation during 2009? |
| | | Did you purchase educational items as an education professional working in primary or secondary schools? |
| | | Did you purchase a new vehicle between February 16, 2009 and December 31, 2009? |
| | | Did you pay real estate taxes on your property during 2009? Please provide data. |
| | | Were you a first-time homebuyer in 2009? 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 estate gifts over \$13,000 to any one person in 2009? |
| | | Did you or your spouse pay any Long Term Care insurance premiums in 2009? |
| | | If you are to receive a refund, would you like a Direct Deposit done? If so please give routing and account numbers. |
| | | Did you have an interest in a financial account located in a foreign country during 2009? |
| | | Did you have any household employees? (babysitter, housekeeper, nanny, etc.) |
| | | Did you or your spouse make contributions to an IRA account during 2009? Traditional? Roth? |
| | | Did you re-characterize any traditional IRAs to a Roth IRA this year? |
| | | Did you have childcare expenses? |
| | | Did you use your vehicle on the job other than for commuting to work? |
| | | Did you make any contributions to an Ohio 529 plan in 2009? |
| | | Do you need any investment advice? |

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

Signature: _____ Date: _____