

# Required Information

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

| Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did any births, adoptions, marriages, divorces, or deaths occur in your family during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Can you or your spouse be claimed as a dependent by someone else?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have dependents who must file a tax return? Were there any changes in dependents from the prior year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts canceled, forgiven or refinanced?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a change in residence or job location during the year? If Yes, when? And from where to where?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make estimated income tax prepayments during the tax year? (Circle those that apply) Federal? State? City?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you install any energy efficiency improvements or energy property in your main residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you received any gambling winnings during 2011? If so, do you have documented offsetting losses? Yes / No   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a new business or purchase any rental property?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 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.                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you surrender any U.S. Savings Bonds or acquire/dispose of any stock during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay tuition on a post-secondary education for yourself or a family member?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest this year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any correspondence from the IRS, state or city for a prior year return? If yes, please attach.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unemployment compensation?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase educational items as an education professional working in primary or secondary schools?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay real estate taxes on your property? Please provide data.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse "rollover" a profit-sharing or retirement plan distribution into another plan?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any estate gifts over \$13,000 to any one person?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse pay any Long Term Care insurance premiums?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any contributions to or receive any distributions from a MSA/HSA account?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>If you are to receive a refund, would you like a Direct Deposit done? If so please give routing and account numbers.</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an interest in a financial account located in a foreign country?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any household employees? (babysitter, housekeeper, nanny, etc.)   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make contributions to an IRA account? Traditional? Roth?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you re-characterize any traditional IRAs to a Roth IRA this year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have childcare expenses?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your vehicle on the job other than for commuting to work?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any contributions to an Ohio 529 plan?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 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: \_\_\_\_\_