

2012 TAX ORGANIZER – QUESTIONNAIRE

Taxpayer Name: _____

Answering these questions will help me make sure all requirements are met in completing your return, and take advantage of any deductions and credits to which you may be entitled. If you answer yes to any of the questions, please include details on a separate sheet. Please contact me if you have any questions or concerns about the questions or any other matter regarding your return.

| | YES | NO |
|---|-----|----|
| Did your marital status change in 2012? | | |
| Did your address change during 2012? | | |
| Did your telephone number change? | | |
| Did your email change? | | |
| Can you or your spouse be claimed as a dependent on someone else's return? | | |
| Were there any changes in dependents from the prior year? | | |
| Did you pay for childcare? | | |
| Do you have any children under 18 with unearned income more than \$950? | | |
| Do you have any children over 18 for whom you provided more than 50% support? | | |
| Did you adopt a child or begin adoption proceedings during 2012? | | |
| Did you have any debts cancelled or forgiven during 2012? | | |
| Did you start a new business during 2012? | | |
| Did you purchase any rental property in 2012? | | |
| Did you purchase or start a farm in 2012? | | |
| Did you sell a business, farm or rental property in 2012? | | |
| Did you sell, exchange, or purchase any real estate in 2012? | | |
| Did you pay any student loan interest in 2012? | | |
| Did you refinance your home or take out a home equity loan on your home? | | |
| Did you have any transactions pertaining to a medical savings account? | | |
| Did you have any transactions pertaining to a health savings account? | | |
| Did you contribute to a Roth IRA or convert an existing IRA to a Roth? | | |
| Did you contribute to a conventional IRA? | | |
| Did you or your dependents incur any college expenses? | | |
| Did you withdraw any amounts from your IRA to pay for college expenses? | | |
| Did you withdraw amounts from a Coverdell Education Savings Account? | | |
| Did you withdraw amounts from a Section 529 plan? | | |
| Did you move to a different home because of a job location change? | | |
| Did you receive unreported tip income of \$20 or more in any month of 2012? | | |
| Did you receive distributions from long-term care insurance contracts? | | |
| Did you own any foreign financial assets? | | |
| Did you purchase a new alternative technology vehicle? | | |
| Did you use gasoline or special fuels for business or farm purposes other than highway use? | | |
| Did you install any alternative energy equipment in your residence? | | |
| Did you install any energy efficiency improvements to your residence? (windows, doors, etc) | | |
| Did you claim a homebuyer credit for a home purchased in 2008? | | |
| Did you make any gifts with a total value in excess of \$13,000 to any one individual? | | |
| Did you forgive any indebtedness to any individual, trust or entity during the year? | | |
| May the IRS discuss the tax return with the preparer? | | |

PLEASE BE SURE TO RETURN YOUR SIGNED ENGAGEMENT LETTER