

Questions Required Before We can Complete Your Return

Please check the appropriate boxes and sign the second page.

	Yes	No
Personal Information		
Did your marital status change during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did your address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	<input type="checkbox"/>	<input type="checkbox"/>
Dependent Information		
Were there any changes in dependents from the prior year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$1,900?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have dependents who must file a tax return?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay for child care while you worked or looked for work?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any expenses related to the adoption of a child during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Purchases, Sales and Debt Information		
Did you start a new business or purchase rental property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan this year or refinance your principal residence or second home this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur any non-business bad debts this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts canceled or forgiven this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a new hybrid, alternative motor, or electric motor energy efficient vehicle this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay any student loan interest this year?	<input type="checkbox"/>	<input type="checkbox"/>
Income Information		
Did you have any foreign income or pay any foreign taxes during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any income from property sold prior to this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401k, or other qualified retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an education savings or 529 Plan account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Social Security benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability income during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive tip income not reported to your employer this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>
Itemized Deduction Information		
Did you incur a casualty or theft loss during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have evidence to substantiate charitable contributions?	<input type="checkbox"/>	<input type="checkbox"/>
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C.	<input type="checkbox"/>	<input type="checkbox"/>
Did you have an expense account or allowance during the year?	<input type="checkbox"/>	<input type="checkbox"/>

Did you make any major purchases during the year (cars, boats, etc.)?

If so, please provide your sales receipt or contract.

p

p

Miscellaneous Information

Did you make gifts of more than \$13,000 to any individual?

p

p

Did you make any contributions to a Health savings account (HSA) or Archer MSA?

p

p

Did you pay long-term health care premiums for yourself or your family?

p

p

Did you pay any COBRA health care coverage continuation premiums?

p

p

If you are a business owner, did you pay health insurance premiums for your employees this year?

p

p

Did you utilize an area of your home for business purposes?

p

p

Did you engage in any bartering transactions?

p

p

Are you an active participant in a pension or retirement plan?

p

p

Did you retire or change jobs this year?

p

p

Did you incur moving costs because of a job change?

p

p

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?

p

p

Did you pay any individual as a household employee during the year?

p

p

Did you make energy efficient improvements to your main home this year?

p

p

Were you a grantor or transferor for a foreign trust, or do you have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?

p

p

Did you receive correspondence from the State or the Internal Revenue Service?

p

p

Do you want to designate \$3 to the Presidential Election Campaign Fund?

If you check yes, it will not change your tax or reduce your refund.

p

p

State Information

Are you a registered Domestic Partner in any state?

p

p

CA Renters Credit ! Did you live in Calif. for at least 6 months and have income less than \$35,659 if you were single or \$71,318 married? Provide landlord's name & address

p

p

Would you like a portion of your State refund to go to a listed charity?

p

p

Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?

p

p

CA Note: For the Dependent Care Credit in California, a provider's telephone number is needed.

Additional questions or information

I have reviewed all answers to these questions and verify that they are correct and complete. I also verify that I have records to substantiate the information contained in this organizer or any supplemental schedules submitted. This includes required substantiation for business or investment, automobile, travel or entertainment expenses.

Signature

Date