

2011	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2011, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2011? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2011, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900? |

INCOME

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes?(not including foreign dividends and related taxes that show up on your investment statements) |
|--------------------------|--------------------------|---|

PURCHASES, SALES AND DEBT

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home? If so, please provide a copy of each relevant HUD 1 settlement statement. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If yes, please provide a description of the expenditure and the amount of the expenditure. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? |

RETIREMENT PLANS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If yes please provide form 1099-R. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make (or want to make) a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another retirement plan? If yes please provide form 1099-R. |

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Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2011? If yes please provide form 1099-R (and label as such).

Did you convert a traditional, SEP, or SIMPLE IRA (or other qualified retirement plan) to a Roth IRA in 2010, and defer the taxable amount of the conversion to tax year 2011 and 2012? If we did your 2010 taxes we should have this info but please remind us.

EDUCATION

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

ITEMIZED DEDUCTIONS

Did you make donations of in kind items during the year. If so, have you provided us with the complete name and address of the organization you donated to as well as a description of the donation, the date the goods were acquired, the cost, the date donated, the value of the donated items and how the value was determined? Most items were bought years ago and their donated value is about 10 % of what you paid for it. A \$100 pair of shoes might be worth \$10. A \$750 sofa might be worth \$75.

Did you use your car on the job (other than to and from work) that was not reimbursed by your employer? If so, talk to us about what information we need to claim those unreimbursed business expenses.

ESTIMATED TAXES

If we provided you with estimated tax vouchers for 2011, did you make all of the payments and make them on time?

Please remember that you can simply return to us the green instruction sheet with some indication of payment and date so we know what you paid and when.

Do you expect your 2012 taxable income and withholdings to be different from 2011? If so give us an idea of what to expect:

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MISCELLANEOUS

- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

If yes, and the account has a value in excess of \$10,000 please realize your obligation to file the FBAR form TDF 90-22.1 (we generally do not prepare these for you).

- Did you incur unreimbursed moving expenses due to a change of employment?
- Did you engage the services of any household employees that you wish to report and pay taxes on?
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency that you did not already tell us about?
- Did you or your spouse make any gifts to an individual that total more than \$13,000, or any gifts to a trust?

Use the space below to tell us anything you think we need to know that you can't find a place for elsewhere in the organizer.