

2009 **1040** **US** **Miscellaneous Questions**

If any of the following items pertain to you or your spouse for 2009, please check the appropriate box and provide additional information if necessary.

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your e-mail address change during the year? If yes, please enter _____. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? If yes, please provide. |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any change in dependents? Please provide name, Soc Sec # & DOB if applicable. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay for childcare while you worked or looked for work, or employ a domestic worker? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay childcare expenses by participating in an employer's Dependent Care Benefits plan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents age 19 or older on 12/31/09? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or college students under age 24 on January 1, 2010 whose interest and dividend income exceeds \$950, or total investment income exceeds \$1,900? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any income that was NOT reported to you on a W-2, Form 1099 or Schedule K-1? If yes, please explain. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any foreign income or pay any foreign income taxes? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell any stocks, bonds or other investment property? If so, please provide purchase price, date of purchase, shares acquired and sold, date of sale, and sales price. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an interest in or signature or other authority over a financial account in a foreign country? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business, purchase rental property, or acquire an interest in a partnership or corporation or sell any of same? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or obtain a home equity loan? If yes, please provide settlement statement(s). |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you contribute to an IRA or other retirement account NOT reported on your W-2? If yes, please enter amount \$_____. |
| <input type="checkbox"/> | <input type="checkbox"/> | If you haven't contributed to an IRA for 2009, do you plan to do so before April 15, 2010? If yes, please enter amount \$_____. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive or pay alimony (not child support)? If yes, please enter amount \$_____. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your dependent incur any tuition expenses to attend a college, university, or vocational school? If yes please provide 1098-T and <u>amount of tuition actually paid in 2009</u> . |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from an Education Savings Account or Qualified Tuition Program? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a Health Savings Account (HSA)? If yes, please provide deductible \$_____, contribution \$_____, and if single _____ or family _____ coverage. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your out-of-pocket medical expenses exceed 7.5% of your income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur an unreimbursed casualty or theft loss greater than 10% of your income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have work-related moving or job-seeking expenses? |

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	Yes	No	
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<input type="checkbox"/>	<input type="checkbox"/>	
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Are you a K-12 teacher or school administrator who worked at least 900 hours and provided school supplies in your job? If yes, please enter amount paid out of pocket, up to \$250, (\$500 if both spouses qualify). \$_____.

<input type="checkbox"/>	<input type="checkbox"/>	
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Did you make any estimated tax payments? If yes, please record on enclosed Organizer.

<input type="checkbox"/>	<input type="checkbox"/>	
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Do you expect your 2010 taxable income and withholdings to be generally the same as 2009?

<input type="checkbox"/>	<input type="checkbox"/>	
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If you have an overpayment of 2009 taxes, do you want it applied to 2010 estimated taxes instead of being refunded?

<input type="checkbox"/>	<input type="checkbox"/>	
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If you have an overpayment of 2009 taxes, do you want it Direct Deposited into your checking account? (You must provide a voided check for deposit account or your refund will be mailed!)

<input type="checkbox"/>	<input type="checkbox"/>	
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Was your home rented out or used for business?

<input type="checkbox"/>	<input type="checkbox"/>	
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Did you make energy efficient improvements to your home in 2009? If so, please provide receipts. Note - appliances do **not** qualify for the tax credit, see Client Update for details.

<input type="checkbox"/>	<input type="checkbox"/>	
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Did you make any large purchases, such as an auto, boat, motor home or motorcycle? If so, please provide copy of invoice(s).

<input type="checkbox"/>	<input type="checkbox"/>	
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Did you purchase a new hybrid vehicle in 2009? If yes, please provide make, model and year.

<input type="checkbox"/>	<input type="checkbox"/>	
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If you are a recipient of Social Security benefits did you receive a \$250 Economic Stimulus check during 2009?

<input type="checkbox"/>	<input type="checkbox"/>	
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Do you want to pay Vermont use tax based on your income for out-of-state purchases or other purchases for which no sales tax may have been paid? **If unanswered we will assume no.**

<input type="checkbox"/>	<input type="checkbox"/>	
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If you are a homeowner, for purposes of the Vermont Act 68 school property tax payment, did anyone other than those indicated on this tax return live in your household in 2009?

<input type="checkbox"/>	<input type="checkbox"/>	
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If you are a homeowner, for purposes of the Vermont Act 68 school property tax payment, did you receive monetary gifts? If yes, please provide total amount \$_____.

<input type="checkbox"/>	<input type="checkbox"/>	
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If you are a homeowner, for purposes of the Vermont Act 68 school property tax payment, did you receive or pay child support? If yes, please enter amount \$_____.

<input type="checkbox"/>	<input type="checkbox"/>	
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Were you notified or audited by either the IRS or the State taxing agency?

<input type="checkbox"/>	<input type="checkbox"/>	
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May the IRS or state taxing agency discuss your tax return with your tax preparer?

Signature(s) and date required to prepare your tax returns!

I (We) have submitted this information for the sole purpose of preparing my (our) tax returns. Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.

Taxpayer signature	____/____/10 Date
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Spouse signature (if applicable)	____/____/10 Date
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