

2011

Income Tax Preparation Questionnaire

R. Ross Briggs, C.P.A. Phone: 989-773-2433 www.rossbriggs.com

QUESTIONS	YES	NO
1. Have you been notified by the IRS of any changes to a prior year's return? <i>If Yes please provide copy of IRS Notices.</i>		
2. Are you aware of any changes to a prior year's income, deductions, or credits that would require filing an amended return? <i>If Yes please explain or attach documentation.</i>		
3. Did you move to a new primary residence in 2011? <i>If Yes, please provide the following:</i> Date of move ___/___/___ New Address _____		
4. Did your marital status change during 2011?		
5. Are you being claimed as a dependent of another person?		
6. Did you make any estimated FEDERAL tax payments in 2011? <i>If yes, please provide the dates and amounts.</i>		
7. Did you make any estimated STATE tax payments in 2011? <i>If yes, please provide the dates and amounts.</i>		
8. Do you expect a substantial change in income or deductions next year?		
9. Were there any changes in dependent information from the prior year? (e.g. New Baby, Adoption, Child Left Home-If a new baby please provide the Full Name, DOB and SSN) Full Name _____ DOB ___/___/___ SSN ___-___-___		
10. Do you have dependents for which a tax return may need to be filed?		
11. Did you have any children who received more than \$1,900 of investment income?		
12. Did you or your spouse change jobs or employers in 2011?		
13. Did you pay or receive alimony in 2011? <i>If Yes, please provide amount and ex-spouse Name _____ and SSN ___-___-___</i>		
14. Did you sell any stocks or securities or mutual funds in 2011? <i>If Yes, please provide Cost Basis Statement(s).</i>		
15. Did you earn any foreign income or have any foreign taxes paid during 2011?		
16. Did you pay sales tax on a major purchase in 2011, such as a vehicle, boat or home?		
17. Did you purchase a new energy-efficient car, truck or van?		
18. Did you buy or sell a home in 2011? ___Bought ___Sold <i>Please provide Closing statement(s).</i>		
19. Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
20. Did you make any new energy-efficient improvements to your home, such as new solar panels, solar water heat, wind turbines, geo-thermal heat pumps, insulation, etc. in 2011? <i>If Yes, please provide receipts.</i>		
21. Did you contribute any money to a traditional or Roth IRA in 2011?		
22. Did you roll over any amounts from a retirement account in 2011?		
23. Are either you or your spouse legally blind?		
24. Are either you or your spouse permanently and totally disabled?		
25. Did you receive interest from a bank account or other financial account? <i>If Yes, please provide Form(s) 1099 INT.</i>		
26. Did you receive dividends from investments? <i>If Yes, Please provide Form(s) 1099 DIV.</i>		
27. Did you receive unemployment during the year? <i>If yes, please provide Form(s) 1099G.</i>		
28. Did you receive payments from a pension or profit sharing plan? <i>Provide Form(s) 1099R.</i>		
29. Did you receive any distributions from an IRA or other qualified plan? <i>If Yes, please provide Form(s) 1099R.</i>		
30. Did you receive Social Security Benefits (retirement or disability)? <i>If Yes, please provide Form(s) 1099 SSA.</i>		
31. Did you receive any disability income? <i>If Yes, please provide Form(s) W2.</i>		
32. Did you start a business?		
33. Were any payments made on student loans? (For you or on behalf of a dependent child) <i>If Yes, please provide Form(s) 1098-E.</i>		
34. Did you pay any tuition or fees for post-secondary education for you or a dependent? <i>If Yes, please provide Form(s) 1098-T.</i>		
35. Did you pay for any post-secondary education course materials (books, supplies, equipment, etc.)? <i>If Yes please provide receipt(s) or detail(s).</i>		

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36. Did you refinance a mortgage or take out a home equity loan? <i>If Yes, please provide Form(s) 1098.</i>		
37. Did you donate cash to any of the following: Michigan colleges or universities, MI public radio, public TV, public libraries, museums, MI community foundations, MI homeless shelters or food banks?		
38. Did you donate any Non-cash item to qualified charities? <i>If Yes please provide "In Good Use" letter.</i>		
39. Did you have any mileage for charity? <i>If so, how many miles?</i> _____		
40. Did you incur any mileage expenses for which you were not reimbursed? <i>If Yes please provide Mileage logs showing business miles and total miles.</i>		
41. Did you incur any business-related educational expenses? <i>If Yes please provide receipt(s) or detail(s).</i>		
42. Did you incur any travel and entertainment expenses? <i>If Yes please provide receipts(s) or detail(s).</i>		
43. Did you work from a home office or use your car for business?		
44. Did you buy a home in 2008 and claim the First Time Homebuyer Credit?		
45. If you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?		
46. Did you purchase or have income from a rental property or farm?		
47. Did you acquire interest in or have income from partnerships? <i>If Yes, please provide Form(s) K-1.</i>		
48. Did you acquire interest in or have income from S-corporations? <i>If Yes, please provide Form(s) K-1.</i>		
49. Did you have any gambling income during the year? <i>If Yes please provide Form(s) W2G.</i>		
50. Did you receive proceeds from an installment sale?		
51. Did you sell any property or equipment on installment or land contract?		
52. Did you make any gifts of over \$13,000 to an individual? <i>If Yes please provide detail(s).</i>		
53. Did you pay child care costs for a dependent child under the age of 13? <i>If Yes please provide Statement from Day Care Center.</i>		
54. Did you receive stock from a stock bonus plan with your employer? <i>If Yes, please provide statement of stocks sold/purchased.</i>		
55. Did you buy or sell any bonds? <i>If Yes please provide Account statement(s).</i>		
56. Did you surrender any U.S. savings bonds? <i>If Yes please provide Form(s) 1099 INT.</i>		
57. Did you suffer a property casualty, theft or condemnation in 2011? <i>If Yes please provide detail.</i>		
58. Did you refinance a mortgage or take a home equity loan? <i>If Yes, please provide the closing statement.</i>		
59. Did you pay any state or local sales or excise taxes in 2011 for the purchase of a NEW motor vehicle? <i>If Yes, please provide a copy of your receipt.</i>		
60. Did you earn any foreign income or have any foreign taxes paid during 2011?		
61. Did you receive any distributions from a health savings account (HSA), Archer MSA, or Medicare Advantage (MA) MSA reported to you on Form 1099-SA?		
62. If you normally itemize your deductions (Schedule A), how much did you pay for vehicle plates: \$ _____		
63. Please verify your Bank Routing # (9 digits) _____ and your Bank Account # _____ for direct deposit of refunds purposes only. For best results please attach a voided check).		
64. Do you use e-mail on a regular basis? <i>If so, please provide your e-mail address _____.</i>		

Other information you feel I should be aware of for your 2011 taxes. Please use a separate sheet if necessary.
