

**2011 Client Tax Questionnaire**

*Applies to January 1, 2011 through December 31, 2011  
(If married filing jointly, the questions apply to you and your spouse)*

Filer's Name \_\_\_\_\_ Birthdate \_\_\_\_\_ SS# \_\_\_\_\_

Phone # \_\_\_\_\_ Occupation \_\_\_\_\_

Email Address \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Birthdate \_\_\_\_\_ SS# \_\_\_\_\_

Phone # \_\_\_\_\_ Occupation \_\_\_\_\_

Email Address \_\_\_\_\_

Special Exemptions: Deaf /Permanently Disabled / Blind / Disabled Veteran? YES \_\_\_\_\_ NO \_\_\_\_\_  
(Circle exemption that applies)

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How many individuals live in your household, including yourself? \_\_\_\_\_

**For current clients**, are your dependents the same as the prior year? YES \_\_\_\_\_ NO \_\_\_\_\_

If no, please describe the changes.

**For new clients**, please list the name, birthday, relationship and social security number of each individual in your household (this will determine dependency). Do not list yourself or your spouse that is listed above.

(1) Name \_\_\_\_\_ Birthdate \_\_\_\_\_ Relationship \_\_\_\_\_ SS# \_\_\_\_\_

(2) Name \_\_\_\_\_ Birthdate \_\_\_\_\_ Relationship \_\_\_\_\_ SS# \_\_\_\_\_

(3) Name \_\_\_\_\_ Birthdate \_\_\_\_\_ Relationship \_\_\_\_\_ SS# \_\_\_\_\_

Please list additional household members on a separate page.

DID ANY OF THE INDIVIDUALS LISTED HAVE INCOME? YES \_\_\_\_\_ NO \_\_\_\_\_

IF YES, PLEASE IDENTIFY WHAT DEPENDENT AND THE TYPE AND AMOUNT OF INCOME RECEIVED.

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Have you moved since you filed last? YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, please list new address \_\_\_\_\_

Did you pay rent and does your name appear on the lease agreement? YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, please list the following:

Name of landlord \_\_\_\_\_

Address of landlord \_\_\_\_\_

Number of months rented during 2011 \_\_\_\_\_ Monthly rent \_\_\_\_\_

Did you receive child support? YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, how much was received? \_\_\_\_\_

Did you pay alimony? YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, please list name, social security, and amount paid.

Did you receive alimony? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, how much was received? \_\_\_\_\_

Did you receive any W-2's, 1098's, 1099's or K-1's? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, we require copies of each.

Did you have any work expenses? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, did you receive any reimbursements from your employer? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you receive unemployment benefits? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you receive SSI, VA benefits, or workers' compensation for yourself, your spouse, or your dependents? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you pay interest on a student loan for yourself, your spouse, or your dependents?  
YES \_\_\_\_\_ NO \_\_\_\_\_

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**COLLEGE INFORMATION**

Did you, your spouse, or your dependents attend college? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, was the person a half-time student? YES \_\_\_\_\_ NO \_\_\_\_\_  
Or was the person a full-time student? YES \_\_\_\_\_ NO \_\_\_\_\_

How many years has the student attended college? \_\_\_\_\_

Does the college student have any felony drug convictions? YES \_\_\_\_\_ NO \_\_\_\_\_

Were the books purchased from the college? YES \_\_\_\_\_ NO \_\_\_\_\_  
How much was paid for books and necessary supplies? \_\_\_\_\_

Was any of the tuition paid for by scholarships, grants, work tuition reimbursement plans, or the Michigan Works Agency? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, how much? \_\_\_\_\_

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Did you pay child care costs for a dependent child under age 13, or costs for caring for a handicapped individual, so you could work, attend school or look for a job? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, list the amount and the name, address, and taxpayer identification number of the care providers.

Did you have any children under the age of 19 or between the ages of 19 to 23 that are full-time students with unearned income of more than \$950? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you convert a traditional IRA to a Roth IRA in 2010 with the intent to pay the tax over two tax years?  
YES \_\_\_\_\_ NO \_\_\_\_\_

Did you pay any individual \$1,700 or more to perform household services during the year, such as babysitting, cleaning, cooking or gardening? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you receive any income from lawsuits? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you have any income from gambling, lotteries, prizes, or jury duty? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you have any self-employment or hobby income? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you receive income from raising animals or crops? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you receive rent from real estate or other property? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you receive income from gravel, timber, minerals, oil, gas, copyrights, or patents?  
YES \_\_\_\_\_ NO \_\_\_\_\_

Did you buy or sell any property or assets? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you own any securities or hold any debts that became worthless? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, please provide details.

Did you have (or did your name appear on another person's) foreign (non-US / located outside the US) bank account, foreign trust, or foreign business that was valued at \$10,000 or more during any one day during the year? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you have foreign financial accounts (non-US / located outside the US) totaling more than \$50,000 (\$100,000 MFJ) on the last day of the year or more than \$75,000 (\$150,000 MFJ) at any time during the year? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you give a gift of more than \$13,000 to one or more people? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you receive any inheritances, life insurance proceeds, gifts of money, or any other type of household support? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you have any debts cancelled or reduced (including credit cards), property repossessed or foreclosed upon, or have you filed for bankruptcy? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you contribute cash, check, credit card or non-cash items to church or other charities?  
YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, please provide the documentation provided by the charity.

Did you pay taxes on any real or personal property? YES \_\_\_\_\_ NO \_\_\_\_\_

Did you install any energy efficient devices? YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, did you get an energy credit on any of the following tax returns: 2006, 2007, 2009, or 2010?  
YES \_\_\_\_\_ NO \_\_\_\_\_

Did you (or will you before April 17, 2012) contribute money to a traditional or Roth IRA?  
YES \_\_\_\_\_ NO \_\_\_\_\_

Would you like your refunds directly deposited into a bank account? YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, do we have your bank information on file from a previous year? YES \_\_\_\_\_ NO \_\_\_\_\_

If not, please provide the information.

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_