

Kelly's Tax Service

2012 "Get Ready" Questionnaire

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Are you married? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Were there any changes to your dependants - i.e. living situations, births, adoptions, or deaths? (Provide social security card and date of birth, or death certificate) |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Can you be claimed as a dependent on another person's tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Are any of your unmarried children who may be claimed as dependents, 19 years or older? |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Are you or your spouse legally blind? |

Income

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Did you have wages? (Bring W-2's). |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Do you have children (under age 19 or college students under age 24 who did not support themselves) with unearned income in excess of \$1,900? (Provide documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Did you or your spouse receive disability/tax exempt income during the year? If yes, how much \$_____. |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. Did you have other sources of income: interest, non taxable interest, dividend, income or loss from a partnership & S-corporation (provide K-1's with instructions), unemployment, social security payments, sick pay, alimony, lottery, gambling, scholarships, bartering, other income not listed? |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. Did you receive any stock options from your employer? |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. Did you sell stock, bonds, investment property, worthless securities, collectables (metal, coins, art, gems, etc) or exercise any stock options during the year? (List the description, date acquired, date sold, sale price, cost or basis, and expense of sale) |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. Did you file bankruptcy, have a foreclosure, or debt forgiveness? (Provide documents) |

Retirement

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 13. Did you or your spouse make contributions to a retirement account? (Provide Documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. Did you or your spouse receive distributions and/or recharacterize from a Retirement Account? (Provide 1099R) |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Did you or your spouse "rollover" a profit sharing or retirement plan distribution into another plan? (Provide Form 1099R) |

Business

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 16. Do you have a business? (Provide gross income and expenses) |
| <input type="checkbox"/> | <input type="checkbox"/> | 17. Is the business licensed with Department of Revenue? |
| <input type="checkbox"/> | <input type="checkbox"/> | 18. Did you complete a B & O tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | 19. Did you purchase any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any assets to business use? (List the description, related business/activity, date placed in service and cost of basis. Provide HUD Report for real estate purchases) |
| <input type="checkbox"/> | <input type="checkbox"/> | 20. Did you dispose of any business assets? (Need date of sale & price) |
| <input type="checkbox"/> | <input type="checkbox"/> | 21. Did you use your vehicle for business? (Provide required mileage log) |
| <input type="checkbox"/> | <input type="checkbox"/> | 22. Are you required to give form 1099 to any vendors who performed work for you in your business? |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. If yes, did you or will you file all required 1099 forms? |

Rental

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 24. Do you have rentals? (Provide rental income and expenses, required mileage log associated with supporting the rental, cost and dates of improvements and/or appliances purchased.) |
| <input type="checkbox"/> | <input type="checkbox"/> | 25. Are you required to give form 1099 to any vendors who performed work on the rental? |
| <input type="checkbox"/> | <input type="checkbox"/> | 26. If yes, did you or will you file all required 1099 forms? |

Home Purchase

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 27. Did you receive the First-Time Homebuyer Credit on your 2008, 2009 or 2010 tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | 28. Are you still residing in the home in which the First-Time Homebuyer credit was received? |
| <input type="checkbox"/> | <input type="checkbox"/> | 29. Do you need to repay the 2008 First-Time Homebuyer credit? |

(over)

Schedule A

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 30. Do you have medical expense or medical miles? (Provide required mileage log) |
| <input type="checkbox"/> | <input type="checkbox"/> | 31. Will you use the standard Sales Tax deduction plus sales tax paid on a vehicle, motor home, boat, aircraft and home improvements? If no, provide actual Sales Tax paid in 2012. |
| <input type="checkbox"/> | <input type="checkbox"/> | 32. Did you have a casualty loss, stolen property or a federally declared disaster casualty loss? (Provide a list showing the date of the event, a list of items with the original cost and value on the date of loss, the insurance reimbursement and police report) |
| <input type="checkbox"/> | <input type="checkbox"/> | 33. Did you make a donation to a qualified Charitable Organization? (Provide documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 34. Did you use your vehicle on the job (other than to and from work)? (Provide required mileage log) |
| <input type="checkbox"/> | <input type="checkbox"/> | 35. Did you or your spouse work out of town or out of county for part of the year? (Provide documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 36. Did you move because of a job change? |
| <input type="checkbox"/> | <input type="checkbox"/> | 37. Do you have any job-seeking expenses? |

Foreign

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 38. Do you have interest in or are you an authorized signature holder on a foreign bank and/or brokerage account? |
| <input type="checkbox"/> | <input type="checkbox"/> | 39. Did you receive a distribution from or were you a grantor of or transferor to a foreign trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | 40. Did you earn investment income from a foreign bank or investment account? |
| <input type="checkbox"/> | <input type="checkbox"/> | 41. Did you pay taxes to a foreign county? |

Other

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 42. Does anyone owe you money that has become uncollectible? If yes, how much \$_____. (Provide documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 43. Did you purchase, sell or refinance your principal home or second home, or do a reverse mortgage during the year? (Provide closing documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 44. Did you or spouse give a gift greater than \$13,000 to any one individual in 2012? |
| <input type="checkbox"/> | <input type="checkbox"/> | 45. Did you contribute to a HSA (Health Savings Account) plan? (Provide Form 5498-SA). |
| <input type="checkbox"/> | <input type="checkbox"/> | 46. Did you pay for tuition for yourself, spouse and/or any dependents? (Provide 1099T and records of school costs) |
| <input type="checkbox"/> | <input type="checkbox"/> | 47. Did you receive a distribution from an education account or a qualified tuition program? |
| <input type="checkbox"/> | <input type="checkbox"/> | 48. Did you pay interest on education loans for yourself, spouse and/or dependents? (Provide documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 49. Did you have any adoption expenses in 2012? |
| <input type="checkbox"/> | <input type="checkbox"/> | 50. Did you pay wages to any household employees in 2012? |
| <input type="checkbox"/> | <input type="checkbox"/> | 51. Did you have child or dependent care expenses that enables you to work or attend school full time? (Provide a list of providers, their SSN's or EIN's, name, address, and amount paid) |
| <input type="checkbox"/> | <input type="checkbox"/> | 52. Did you purchase a new electric drive motor vehicle in 2012? |
| <input type="checkbox"/> | <input type="checkbox"/> | 53. Did you install any qualified energy improvements, such as energy efficient windows, doors, metal roofs, heat pumps, water heaters, air conditioning, furnace and insulation? |
| <input type="checkbox"/> | <input type="checkbox"/> | 54. Did you install any energy efficient materials in 2012? (solar energy systems, fuel cells, small wind energy systems, geothermal heat pumps?) |
| <input type="checkbox"/> | <input type="checkbox"/> | 55. Did you receive a personal correspondence from the IRS or were you audited in 2012? |
| <input type="checkbox"/> | <input type="checkbox"/> | 56. Did you pay estimated tax for 2012? (Provide documents) |
| <input type="checkbox"/> | <input type="checkbox"/> | 57. Are you expecting a refund? (Provide a cancelled check/savings slip for direct deposit information) |
| | | 58. How would you prefer to be contacted? |
| | <input type="checkbox"/> | Home phone |
| | <input type="checkbox"/> | Cell phone |
| | <input type="checkbox"/> | E-mail address: _____ |