

2008 Tax Questionnaire

**COMPLETION OF THE TAX QUESTIONNAIRE
ALONG WITH YOUR SIGNATURE IS MANDATORY FOR THE 2008 TAX SEASON.**

Please take a moment to complete the following questionnaire, in order that we may accurately report all necessary tax events for this tax year. **Your signature is required on the last page.**

If you received any of the following forms, please include them with your other tax information . Please provide any additional tax documentation, so that we may accurately include all taxable income you may have received throughout the year. If you are uncertain, provide the information and we will determine the tax impact.

W-2 W-2G	1099SSA	1099C (Debt Cancellation)	1120S K- 1	1099B Brokerage Statements (all pages)	1099Q (529 w/d)
1099 INT	1099 SA (HSA)	1099A	1065 K-1	1099S (Sale of RE)	1098 T (tuition)
1099 DIV	1099 MISC	1099G	1041 K-1	1098 Mortg. Int.	1099LTC
1099R					

Personal Information	Yes	No
Did your marital status change during the year?		
If you are married, do you and your spouse want to file separate returns?		
Did your contact information change during 2008?		
If so , please provide your new address, phone number, cell phone number, and email address.		
Address:		
Home phone:		
Cell phone:		
We have found that email addresses often change. Please provide your current one so that we are up to date.		
Email:		
Can you or your spouse be claimed as a dependent by another taxpayer?		

Dependents		Yes	No
Were there any changes in dependents from the prior year?			
If adding a dependent, please provide the following:			
Name:			
Social Security No.:			
Date of Birth:			
If losing a dependent, please identify:			
Did you pay for childcare while you worked or looked for work?			
If so , please provide the following for each child:			
Provider's name:			
Provider's address:			
Social Security No. or EIN No.:			
Amounts paid in 2008:			
Do you have any children with wages, interest, or dividend income over \$900 , or who have sold any stock in 2008?			
If yes , do you want us to prepare their return(s)?			
Did you adopt a child or begin adoption proceedings during 2008?			
Schedule A – Itemized Deductions Information		Yes	No
Did you have significant out of pocket medical expenses ?			
If yes, approximately how much?		\$	
Please provide all 1098 Mortgage Interest statements and all real estate tax bills for 2008..			
Are you claiming a deduction for mortgage interest paid to a financial institution, for which someone else received the Form 1098?			
If so, please specify:			
Did you pay any mortgage interest to an individual ? If yes , please provide the following:			
Name:			
Address:			
Social Security No:			
Amount paid in 2008:	\$		
Did you pay any mortgage insurance premiums in 2008?			
If so, please provide amount paid.		\$	

Regarding charitable contributions , how much of your deductible contributions were made in the following forms:			
Cash:	Only list the total amount for which you have receipts. Receipts are required , regardless of the dollar amount, even for as little as a \$1 contribution.		\$
Check:	For checks and credit cards, only list the amount you can substantiate with the following: (1) For separate contributions of \$250 or more, you must have written acknowledgement from the charity, your canceled check is not enough; (2) For separate contributions under \$250, either a bank record or a receipt is required.		\$
Credit card:			\$
Clothing and household goods:	These must be in good condition or better . Only list the total amount you can substantiate with receipts if the contribution is \$250 or greater. If over \$500, please indicate the name and address of the charity:		\$
Other contributions:	Please describe and attach support.		\$
Miles driven to provide services to a charity.		Charitable miles:	
		Yes	No
Did you make any large purchases , such as a motor vehicle or boat in 2008?			
If so , please provide us with the invoice amount and sales tax paid on the transaction.			
Did you incur any casualty or theft losses during the year?			
If so , provide details:			
Did you pay union or professional dues , incur uniform or un-reimbursed auto or certain investment expenses or have gambling losses (to the extent of winnings)?			
If so , provide details:			
Self Employed – Business Income and Expenses, if any		Yes	No
Did you start or dispose of a business during the past year? If so, please discuss the matter with one of us.			
If you are self employed , please provide the amount you paid in health insurance premiums for yourself and your dependents.			\$
If you are self-employed, or your spouse is self-employed, are you or your spouse eligible to be covered under an employer’s health plan at another job?			
If yes, how many months were you covered?		Months:	
Business car expenses need to be substantiated with mileage logs and trip sheets for each trip. Do you have a record of total miles and business miles driven? (Note that commuting miles between your home and a fixed work location are not considered deductible business miles.)			
If yes , please provide the following:	Business miles (1/1/08 – 6/30/08):	Total miles:	
	Business miles (7/1/08 – 12/31/08)		

Please provide us with your related business expenses, any newly acquired business assets, business-related car expenses, and business use of home expenses.					
Purchases, Sales, and Debts				Yes	No
Did you sell any securities , bonds, or other investment property ?					
If so , please attach a statement of cost basis, dates of purchase, shares acquired, shares sold, date of sale, and sales price. <u>Your broker may be able to provide this information to you easily.</u>					
If you sold at a loss, did you buy back the identical security sold within 30 days before or after the sale?					
If yes, please explain:					
Did you have any debts canceled, forgiven, or refinanced during 2008?					
Did you purchase or sell a rental property or farm , or acquire or sell any interest in any partnership or S Corporation during 2008? Please provide us with the K-1s as soon as they are available.					
Did you receive grants of stock options from your employer, exercise any stock options granted to you, or dispose of any stock acquired under a qualified employee stock purchase plan? If so, please provide support (statements/schedules from your employer).					
Did you engage in any put or call transactions?					
Home/Real Estate Transactions				Yes	No
Have you refinanced your mortgage or taken out a home equity loan this year? If yes , please provide a copy of the settlement statement .					
Did you use any of the proceeds for any purpose other than improving your principle residence? If yes , please explain.					
Did you sell, exchange, or purchase any real estate in 2008? If so , please attach the closing statements.					
Did you sell your primary residence in 2008? If no, go to the next section.					
If yes, did you own and occupy the home as your principle residence for at least 2 years out of the 5-year period prior to the sale?					
Did you ever rent out this property?					
Did you ever use any portion of the home for business purposes?					
Have you or your spouse sold a principle residence within the last 2 years?					
At the time of the sale, the residence was owned by:		Taxpayer	Spouse	Both	
IRA/Pensions				Yes	No
Did you withdraw any amounts from your Individual Retirement Account (IRA), Roth IRA , or pension plan ?					
Indicate amount of total withdrawal/distribution and provide all 1099Rs.				\$	
If so , was it to acquire a principle residence or pay for qualified higher education expense?					

Did you make a contribution to a retirement plan, 401k, SIMPLE, or SEP that is not reported on your W-2 or K-1?			
If so , indicate amount and type of plan.	Taxpayer's total contribution: \$	Spouse's total contribution: \$	
Did you retire or change jobs in 2008?			
Did you receive retirement or severance compensation?			
Did you or your spouse contribute to a Roth IRA or convert an existing IRA to a Roth IRA?			
Did you or your spouse turn age 70 ½ during the year and have money in an IRA or other retirement account without taking a distribution?			
Have you taken your required minimum distribution (even if you are older than 70 ½)?			
Were any distributions from your IRA and/or Roth IRA distributed to a charitable organization ?			
Gifts		Yes	No
Did you or your spouse make any gifts , including birthday, holiday, anniversary, graduation, etc., with a total aggregate value in excess of \$12,000 to any individual during the year?			
Did you or your spouse make any gifts to a trust for any amount during the year?			
Did you forgive any indebtedness to any individual, trust, or entity during the year?			
If yes , please explain:			
Miscellaneous		Yes	No
Did you pay any student loan interest ?			
Did you or your dependents incur any post-secondary education expense , such as tuition?			
Student's name:	Tuition amount: \$		
Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (529 Plan)? If yes , include Form 1099-Q .			
Did you move to a different home because of a change in the location of your job ?			
Did you have any household employees , whom you paid in excess of \$1,000 in any quarter or \$1,600 for the entire year?			
Did you or your spouse receive distributions from long-term care insurance contracts? If yes , include Form 1099-LTC.			
Did you or your spouse have an interest in or a signature authority over a bank account, financial account or a trust in a foreign country?			
If yes, we are required to file an additional form. Failure to file can result in penalties ranging from \$25,000 to \$100,000.			
Did you purchase a new "hybrid" or alternate technology vehicle in 2008?			
Were you notified by the IRS or other taxing authority of any changes in prior year returns ? If yes , please provide a copy of the notice .			
		Yes	No
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic), or fuel cells?			
Did you receive any payments from insurance companies, legal settlements, disability payments, or other taxable income ?			

Indicate amount: \$				
Did you or your spouse have any transactions pertaining to a Health Savings Account (HSA) during 2008? If you received a distribution from an HSA, please attach Form 1099-HAS .				
Did you or your spouse make any contributions to a Qualified State Tuition Plan (Section 529 plans) or a Coverdell Educational Savings Account during 2008?				
Did you engage in any bartering transactions ?				
Did you have any work outside of the U.S. or pay any foreign taxes ?				
Refund Options		Yes	No	
If you have an overpayment of 2008 taxes, do you want the excess:				
Refunded via a check in the mail?				
Refunded via Direct Deposit (please <u>attach a copy of a voided check</u>)?				
Applied to your 2009 estimated tax liability				
Federal, State, and Local Estimated Tax Payments Made				
	Date Paid	Federal Amount	State Amount	Local Amount
	2008 1 st Qtr. ES due 04-15-2008	\$	\$	\$
	2008 2 nd Qtr. ES due 06-16-2008	\$	\$	\$
	2008 3 rd Qtr. ES due 09-15-2008	\$	\$	\$
	2008 4 th Qtr. ES due 01-15-2009	\$	\$	\$

Authorization			
With your authorization, the IRS and certain states allow us to verify credits, payments, etc., for your tax account online. Do we have your authorization to view this information, if necessary?			
Do you expect your 2009 taxable income and withholding to be generally the same as 2008?			
If not, please provide details:			

Kindly sign below and return this questionnaire to our office with your tax information. We will return this questionnaire to you along with all of the other tax information that you provide to us.

Sincerely Yours,

Donovan & Limroth, CPA's

I (We) have submitted this information for the sole purpose of preparing my (our) tax return. 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.

If applicable, both taxpayer and spouse must sign.

Accepted by: _____
Taxpayer's signature

Spouse's signature

Printed name: _____

Date: _____

Return Delivery Preference	
	Email – password protected file
	Pick up at our office
	U.S. Mail

Note: Whichever method you choose, all of your original documents will be returned to you.