

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.

PERSONAL AND DEPENDENT INFORMATION

Your best email address _____

Yes No

Did your marital status change during the year?

Has your address changed? Please be sure we have your current address.

What county did you live in Jan. 1, 2009? Taxpayer _____ Spouse _____

What was the school district of the Taxpayer Jan. 1, 2009? _____

Did you pay any rent in 2009 for your personal residence?

Landlord's Name _____

Landlord's Address _____

No. of months rented _____ Amount of Rent Paid \$ _____

Did your occupation change during the year?
If so, what was your occupation in 2009? Taxpayer _____ Spouse _____

Were there any changes in dependents?

Could you be claimed as a dependent for 2009 on another person's tax return?

Were any of your unmarried children, who might be claimed as dependents, 19 years of age or older at the end of 2009?

Did you have any dependent children who are 24 years old or older who are also full-time students?

Did you have any children under age 19 (or under 24 if a full-time student) on January 1, 2010 with interest and dividend income in excess of \$950 or total investment income in excess of \$1,900?

Did you pay for the care of one or more dependents to enable you to work?
If so, please include the following on to whom it was paid:

Name & Address _____ Soc. Sec. No. _____ Amount Paid _____ Dependent's Name _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

PURCHASES, SALES AND DEBT

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business, purchase rental or royalty property, or acquire an interest in a partnership or S corporation? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell stocks, bonds, mutual funds or other investment property in 2009? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you exercise any stock options during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any investments that became <u>completely</u> worthless in 2009? (Does not include assets in retirement plans.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take out a home equity loan? <u>(If so, please bring a copy of your closing papers.)</u> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any out-of-state purchases for which you owe Indiana Sales Tax? (mail-order catalogs, book clubs, etc) If so, amount of those purchases \$_____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any energy-efficient (insulation, external windows, doors, HVAC, water heaters, biomass stoves, roof, solar energy, wind energy, geothermal, or fuel cell) property or improvements? <u>If so, please bring documentation.</u> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy a qualifying hybrid vehicle during 2009? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or lease a vehicle, motor home, boat, home or substantial amount of building materials in 2009? If so, list the amount of sales tax paid on: |
| | | Motor vehicle \$_____ Motor home \$_____ Motorcycle \$_____ |
| | | Home \$_____ Home building materials \$_____ Boat \$_____ |

RETIREMENT PLANS

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any distributions from a retirement plan: 401(k), IRA, SEP, SIMPLE, Qualified Plan etc? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse reach the age of 70 1/2 in 2009? |
| <input type="checkbox"/> | <input type="checkbox"/> | Will you or your spouse reach the age of 70 1/2 in 2010? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you "roll over" a profit-sharing or retirement plan distribution into another plan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA into a Roth IRA? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you interested in making additional contributions to a retirement plan (IRA, etc.) for 2009? |

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Miscellaneous Questions

Did you inherit an IRA or a retirement account during 2009?

Yes No

Did you or your spouse receive a \$250 economic recovery pymt? You may have received this if you receive soc sec benefits or govt pensions not covered by soc sec.
Amount received: Taxpayer \$_____ Spouse \$_____

EDUCATION DEDUCTIONS

Did you make any investments during the year into Indiana's 529 Plan (College Choice)?
Account No. _____ Amount \$_____

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

Did you pay any educational loan interest?

Did you make any contributions to an Indiana College or University?

College/Univ _____ Date Given _____ Amount \$_____

ESTIMATED TAXES

If you have an overpayment of 2009 taxes, do you want the excess applied to your 2010 estimated tax (instead of being refunded)?

Do you expect 2010's taxable income and withholding to be about the same as 2009?

MISCELLANEOUS

May the IRS &/or Ind. Dept. of Revenue discuss these returns with the preparer?

Would you like to directly deposit any refunds into your bank account?
If so, **we will need a voided check for your account numbers.**

Did you use your car on the job (other than to and from work)?

Did you move at least 50 miles because of a job change?

Did you use any part of your home for business?

Did you engage the services of any household employees?

Did you incur a loss because of damaged or stolen property?

In order for charitable donations to be deductible, you must have a receipt for cash donations or for checks of \$250 or more. Do you have the required receipts?

Did you have a medical savings account (MSA) or health savings account (HSA) or acquire an interest in a MSA or HSA because of the death of the account holder?

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Miscellaneous Questions

- Were you a policyholder who received long-term care (LTC) insurance payments?
- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- Did you get distributions from, or were you a grantor of or transferor to a foreign trust?

Taxpayer Signature

Spouse Signature