

## General Questions Form

### Personal Information

1) Did you purchase a motor vehicle or boat during 2006? Yes\_\_\_\_ No\_\_\_\_  
If **yes**, attach documentation showing sales tax paid

2) Did your marital status change during 2006? Yes\_\_\_\_ No\_\_\_\_  
If **yes**, explain\_\_\_\_\_

3) Do you want to allow your tax preparer to discuss this year's return with the IRS? Yes\_\_\_\_ No\_\_\_\_

If no, enter another person (if desired) to be allowed to discuss This person with the IRS

**Caution:** Review any transferred information for accuracy

Designee's Name:\_\_\_\_\_

Phone Number:\_\_\_\_\_

Personal Identification Number (5 digit PIN):\_\_\_\_\_

4) Do you or your spouse plan to retire in 2007? Yes\_\_\_\_ No\_\_\_\_

5) Were you or your spouse permanently and totally disabled in 2006? Yes\_\_\_\_ No\_\_\_\_

6) Enter date of death for taxpayer or spouse (if during 2006 or 2007) \_\_\_\_\_

7) a. Do you have dependents who must file? Yes\_\_\_\_ No\_\_\_\_

b. If **yes**, do you want us to prepare the returns? Yes\_\_\_\_ No\_\_\_\_

### Dependent Information

8) a. Do you have children under the age of 14 with investment income greater than \$1,600? Yes\_\_\_\_ No\_\_\_\_

b. If **yes**, do you want to include your child's income on your return? Yes\_\_\_\_ No\_\_\_\_

9) Are any of your dependents **not** U.S. citizens or residents? Yes\_\_\_\_ No\_\_\_\_

10) Did you provide over half the support for any other person during 2006? Yes\_\_\_\_ No\_\_\_\_

11) Did you incur adoption expenses during 2006? Yes\_\_\_\_ No\_\_\_\_

### IRA and Pension Plan

12) Did you receive payments from a pension or profit-sharing plan Yes\_\_\_\_ No\_\_\_\_

13) Did you receive a total distribution from an IRA or other Yes\_\_\_\_ No\_\_\_\_

qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?

14) Did you convert all or part of a regular IRA into a Roth IRA? Yes  No

15) Did you contribute to a Coverdell Education Savings Account? Yes  No

## Items Related to Income/Loss

16) Did you receive any disability payments in 2006? Yes        No

17) Did you receive tip income not reported to your employer? Yes  No

18) Did you sell and/or purchase a principal residence in 2006? Yes  No

(Attach copies of your purchase and/or sale escrow statements)

19) Did you have any installment sale amounts from relatives? Yes        No

20) Did you incur any non-business bad debts? Yes  No

## Prior Tax Returns

22) Were you notified by the Internal Revenue Service or state  
taxing Yes  No

authority of changes to a prior year's return?

(if yes enclose agent's report or notice of change)

23) Were there changes to a prior years income, deductions, credits etc Yes        No         
which would require filing an amended return?

List any other questions you may have

