

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 authority of changes to a prior year's return?
(if yes enclose agent's report or notice of change) Yes____ No____

23) Were there changes to a prior years income, deductions, credits etc
which would require filing an amended return? Yes____ No____

List any other questions you may have
