

CLIENT QUESTIONNAIRE for TAX YEAR 2009

NAME _____ PHONE _____ DATE _____

Please answer **YES** or **NO** to each of the following questions:

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| Can you be claimed as a dependant by another taxpayer? | Yes | No |
| Were there any Births, Deaths, Divorces, Marriages or Adoptions in 2009? | Yes | No |
| Do you expect your income or deductions to go up substantially in 2010? | Yes | No |
| Did you provide a home for or help support another person? | Yes | No |
| Did you make estimated tax payments? | Yes | No |
| Did you file Bankruptcy/Canceled Debt or modify a loan? | Yes | No |
| Do you own General Motors stock? | Yes | No |
| Did you withdraw from or sell a mutual fund or stocks? | Yes | No |
| Did you contribute or withdraw from a pension plan or IRA? | Yes | No |
| Did you put money into a Nebraska college savings plan? | Yes | No |
| Did you pay interest on a student loan? | Yes | No |
| Did you pay any college Tuition? | Yes | No |
| Did you give a gift of more than \$13,000 to one or more people? | Yes | No |
| Did you have a Health Savings Acct or Self-employment health insurance? | Yes | No |
| Did you receive any correspondence from the IRS or NE Dept of Rev? | Yes | No |
| Did you replace Windows, A/C, Heat Pump, Furnace, Roof, Insulation or Doors? | Yes | No |
| Did you install a Solar or Wind Energy Product? | Yes | No |
| Did you refinance your home loan or equity loan? | Yes | No |
| Did you sell/purchase your home (or plan to), land or other personal property? | Yes | No |
| Did you pay any real estate taxes in 2009? | Yes | No |
| Did you buy a new car, truck, motor home, or motorcycle after Feb 16, 2009? | Yes | No |
| Did you purchase a hybrid fuel car or electric car? | Yes | No |
| Did you own any rental property? | Yes | No |
| Did you own any interest in a partnership? | Yes | No |
| Did you start or dispose of a business this year? | Yes | No |
| Did you have any foreign income or bank accounts? | Yes | No |
| Is there any other income to report on your return? | Yes | No |
| CIRCLE any items that pertain to you or your spouse: Alimony, Scholarship, Grants, Gambling Winnings, Savings Bonds, Jury Duty, Unemployment Compensation, Prizes, Bonuses, Awards, Unreported Tips, Commissions, Worker's Compensation, Disability, Veteran's Pension, Installment Sale Payments, State Tax Refund. | | |
| Do you want to direct deposit your refund? | Yes | No |
| If you owe with your return, do you want it taken out of your bank account? | Yes | No |