

2009 TAX QUESTIONNAIRE

PERSONAL INFORMATION:

- | | Yes | No |
|---|--------------------------|--------------------------|
| Did your marital status change during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| If married, do you and your spouse want to file separate returns? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your address change during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Can you or your spouse be claimed as a dependent by another taxpayer? | <input type="checkbox"/> | <input type="checkbox"/> |

DEPENDENTS:

- | | | |
|---|--------------------------|--------------------------|
| Were there any changes in dependents from the prior year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care while you worked or looked for work? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have any children under the age 18 with unearned income more than \$1,700? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you adopt a child or begin adoption proceedings during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |

INCOME:

- | | | |
|--|--------------------------|--------------------------|
| Did your sources of income change from the previous tax year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you receive cash income? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive social security benefits? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any non-taxable deposits into your bank account(s), such as home equity lines of credit, other loans or gifts? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive unemployment compensation? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive gambling winnings in 2009? | <input type="checkbox"/> | <input type="checkbox"/> |

PURCHASES, SALES and DEBT:

- | | | |
|---|--------------------------|--------------------------|
| Did you purchase your first home in 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any debts refinanced during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any debts canceled or forgiven during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you experience a foreclosure or a short-sale of any real estate in 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive a 1099-A and/or a 1099-C? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you start a new business, purchase a new rental property or farm, or acquire any new interest in any partnership or corporation during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell an existing business, rental property, farm or any existing interest in a partnership, LLC, or corporation during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell, exchange or purchase any real estate in 2009? If so, please attach closing statements. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you withdraw any amounts from your Individual Retirement Account (IRA), employer retirement plan, or Roth IRA to acquire a principal residence? | <input type="checkbox"/> | <input type="checkbox"/> |
| 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? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any student loan interest in 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you take out a home equity loan in 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are you claiming a deduction for mortgage interest paid to a financial institution for which someone else received the Form 1098? | <input type="checkbox"/> | <input type="checkbox"/> |

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DEFERRED COMPENSATION & RETIREMENT PLANS:

- | | Yes | No |
|---|--------------------------|--------------------------|
| Did you participate in your employer's retirement plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you contribute to your own IRA (Individual retirement account)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you contribute into a SEP or Simple IRA or Keough plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you contribute into any other retirement plan? | <input type="checkbox"/> | <input type="checkbox"/> |

ITEMIZED DEDUCTIONS:

- | | | |
|---|--------------------------|--------------------------|
| Did you have any major medical expenses for 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you contribute property (other than cash) with a fair market value of more than \$500 to a charitable organization? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you incur any casualty or theft losses during the year? | <input type="checkbox"/> | <input type="checkbox"/> |

MISCELLANEOUS:

- | | | | | |
|---|--------------------------|--------------------------|--|--|
| Did you or your spouse have any transaction pertaining to a Medical Savings Account (MSA) during 2009?
If you received a distribution from an MSA, please include Form 1099-SA. | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you or your spouse have any transaction pertaining to a Health Savings Account (HSA) during 2009?
If you received a distribution from an HSA, please include Form 1099-SA. | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you or your spouse contribute to a Roth IRA or convert a traditional IRA into a Roth IRA? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you,
your spouse, your children or grandchildren? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program
(Section 529 plan)? If yes, include Form 1099-Q. | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you or your dependents incur any post-secondary education expenses, such as tuition? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| If you or your spouse are self-employed, are you or your spouse eligible to be covered
under an employer's health plan at another job? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| If yes, how many months were you covered? <table border="1" style="display: inline-table; vertical-align: middle; border-collapse: collapse;"><tr><td style="text-align: center;">Months</td></tr><tr><td style="height: 15px;"> </td></tr></table> | Months | | | |
| Months | | | | |
| | | | | |
| Did you move to a different home because of a change in the location of your job? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you pay in excess of \$1,000 in any quarter, or \$1,500 during the year for domestic services performed in or around
your home to individuals who could be considered household employees? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you receive any unreported tip income of \$20 or more in any month of 2009? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you or your spouse receive a distribution from long-term care insurance contracts?
If yes, please include Form 1099-LTC. | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you make gifts of more than \$13,000 to any individual? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you have any foreign income or pay any foreign taxes during 2009? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Were you or your spouse grantor of or a transferor to a foreign trust, have an interest in or a signature or
other authority over a bank account, securities account or other financial account in a foreign country? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you create or transfer money or property to a foreign trust? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you create or transfer money or property to any foreign bank account(s)? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you purchase a new "clean fuel" vehicle or electric vehicle in 2009? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year? | <input type="checkbox"/> | <input type="checkbox"/> | | |

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- | | Yes | No |
|--|--------------------------|--------------------------|
| Have you received a punitive damage award or an award for damages other than for physical injuries or illness? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you engage in any bartering transactions? | <input type="checkbox"/> | <input type="checkbox"/> |
| Were you notified by the IRS or other taxing authority of any changes in prior year returns? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you lose your job during 2009 because of foreign competition and pay for your own health insurance? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any bank account(s) in any foreign country? | <input type="checkbox"/> | <input type="checkbox"/> |

SEVERANCE & RETIREMENT:

- | | | | | |
|---|--|--------------------------|------|--|
| Did you retire or change jobs in 2009? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Did you receive retirement or severance compensation? | <input type="checkbox"/> | <input type="checkbox"/> | | |
| If yes, enter the date received (Mo/Day/Yr) | <table border="1" style="margin: auto;"> <tr> <td style="text-align: center;">Date</td> </tr> <tr> <td style="height: 20px;"> </td> </tr> </table> | | Date | |
| Date | | | | |
| | | | | |
| Did you or your spouse turn age 70 1/2 during the year and have money in an IRA or other retirement account without taking any distributions? | <input type="checkbox"/> | <input type="checkbox"/> | | |

SALE OF YOUR HOME:

- | | | |
|---|---|--------------------------|
| Did you sell your home in 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, did you own and occupy the home as your principle residence for at least two years of the five-year period prior to the sale? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you experience a foreclosure or a short-sale of any real estate in 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you ever rent out this property? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you ever use any portion of the home for business purposes? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you or your spouse sold a principle residence within the last two years? | <input type="checkbox"/> | <input type="checkbox"/> |
| At the time of the sale the residence was owned by the: | <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Both | |
| Did you acquire the property through a 1031 exchange? | <input type="checkbox"/> | <input type="checkbox"/> |

ADDITIONAL INFORMATION:

- | | | |
|--|--------------------------|--------------------------|
| With respect to any trust you have created for which you are the trustee, have any beneficiaries died during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2009? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, enter the following | | |

Name of Designated Beneficiary	State Sponsorship Plan	Account Number	2009 Amount Contributed

PLEASE SIGN BELOW	
_____ Please print your name	
_____ Please sign your name	_____ Date