

2014

1040

US

**Miscellaneous Questions**

If any of the following pertain to you or your spouse for 2014  
please check the appropriate box and provide additional information if necessary.

Please do not staple or attach your information to the organizer, simply enclose your documents when you  
return the organizer to us.

**Personal & Dependent Information**

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in the dependents you claim?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2014?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2013 with interest and dividend income in excess of \$1,000 or total investment income in excess of \$2,000? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return?  |

**Health Care Coverage**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have health care coverage for the full year?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any of the following IRS Documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) If so, please provide.  |
| <input type="checkbox"/> | <input type="checkbox"/> | If you or your dependents did not have health care coverage during the year, do you fall into one of the following exempt categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship? If you received an exemption certificate, please provide to us. |

**Income & Investments**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any canceled or forgiven debt, including credit card debt?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any non-reportable disability or other tax free income?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property? <b>If yes, please provide cost basis information and associated 1099s.</b>       |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$14,000 or any gifts to a trust?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any interest in banks, securities or other financial accounts in foreign countries that had a <b>combined</b> value exceeding \$10,000? |

**Retirement Plans**

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**Miscellaneous Questions**

- Did you **receive** a distribution from or **make** a contribution to a retirement plan (401(k), IRA, etc.)?
- Did you transfer or **roll over** any amount from one retirement plan to another retirement plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?

**Business & Work Related**

- Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Did you use your car on the job (other than driving to and from work)?
- Was your home rented out or used for business?

**Deductions & Credits**

- Did you incur moving expenses due to a change of employment?
- Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) in 2014? Or did you receive an HSA distribution?
- Did you pay any extraordinary sales tax (i.e. the construction/remodel of a home, purchase of auto, etc.)? **If yes, please provide the total sales tax paid on these items in 2014** \_\_\_\_\_
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? **If yes, please provide copies of your closing statements.**
- Did you make any energy-efficient home improvements to your primary home such as residential solar energy, wind energy, geothermal, or fuel cell improvements?
- Did you, your spouse or a dependent incur any tuition, books, supplies or equipment (i.e. computer) expenses that were used to attend a college, university, or vocational school?
- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

**General Questions**

- May the IRS discuss your tax return with your tax preparer?
- Were you notified or audited by either the Internal Revenue Service or by a State taxing agency?
- Did your bank account information change within the last twelve months?

***Please take a moment to review and sign our Annual Engagement Letter which is enclosed on orange paper with your organizer.***