

2001	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2001,  
please check the appropriate box and include all pertinent details.

Attach additional schedules if necessary

**PERSONAL INFORMATION**

Yes

No

☐☐

Did your marital status change during the year?

☐☐

Did your address change during the year?

☐☐

Could you be claimed as a dependent on another person's tax return for 2001?

**DEPENDENTS**☐☐

Were there any changes in dependents?

☐☐

Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2001?

☐☐

Did you have any children under age 14 on January 1, 2002 with interest and dividend income in excess of \$750, or total investment income in excess of \$1500?

**TAX REBATE/ADVANCE PAYMENT**☐☐

Did you receive a tax rebate/advance payment from the Internal Revenue Service? If yes, specify the amount. \$\_\_\_\_\_

**INCOME**☐☐

Did you receive unreported tip income of \$20 or more in any month?

☐☐

Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?

☐☐

Did you receive any disability income?

☐☐

Did you have any foreign income or pay any foreign taxes?

**PURCHASES, SALES AND DEBT**☐☐

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?

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☐ ☐ Did you buy or sell any stocks, bonds or other investment property? Specify the sale of any collectibles (e.g., artwork, gems, stamps, coins) and any qualified small business stock.

☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

☐ ☐ Did you have any debts cancelled or forgiven?

☐ ☐ Did anyone owe you money which had become uncollectible?

### RETIREMENT PLANS

☐ ☐ Did you receive a distribution from a profit-sharing plan, retirement plan, or individual retirement arrangement (including Traditional IRA, Roth IRA, and Education Savings Account)?

☐ ☐ Did you convert from a Traditional IRA to a Roth IRA?

☐ ☐ Did you contribute to a Traditional IRA, Roth IRA, or Education Savings Account?

### ITEMIZED DEDUCTIONS

☐ ☐ Did you incur a loss because of damaged or stolen property?

☐ ☐ Did you work out of town for part of the year?

☐ ☐ Did you use your car on the job (other than to and from work)?

### MISCELLANEOUS

☐ ☐ Do you want to allocate \$3 to the Presidential Election Campaign Fund?

☐ ☐ Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

☐ ☐ May the IRS discuss this return with the preparer?

☐ ☐ Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

☐ ☐ Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

☐ ☐ Was your home rented out or used for business?

☐ ☐ Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

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| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur moving expenses due to a change of employment?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any adoption expenses?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any household employees?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency?                |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$10,000, or any gifts to a trust? |