

2002	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2002, please check the appropriate box and provide additional information 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 2002? |

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 2002? |
| ☐ | ☐ | Did you have any children under age 14 on January 1, 2003 with interest and dividend income in excess of \$750, or total investment income in excess of \$1,500? |

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? |
| ☐ | ☐ | Did you buy or sell any stocks, bonds or other investment property? |
| ☐ | ☐ | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? |

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☐ ☐ 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 retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?

EDUCATION

☐ ☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

☐ ☐ Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12?

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)?

ESTIMATED TAXES

☐ ☐ Did you apply an overpayment of 2001 taxes to your 2002 estimated tax (instead of being refunded)?

☐ ☐ If you have an overpayment of 2002 taxes, do you want the excess applied to your 2003 estimated tax (instead of being refunded)?

☐ ☐ Do you expect your 2003 taxable income and withholdings to be generally the same as 2002?

MISCELLANEOUS

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- | | | |
|--------------------------|--------------------------|---|
| ☐ | ☐ | Do you want to electronically file your tax return? |
| ☐ | ☐ | 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? |
| ☐ | ☐ | Did you incur moving expenses due to a change of employment? |
| ☐ | ☐ | Did you engage the services of any household employees? |
| ☐ | ☐ | Were you notified or audited by either the Internal Revenue Service or the State taxing agency? |
| ☐ | ☐ | Did you or your spouse make any gifts to an individual that total more than \$11,000, or any gifts to a trust? |