

2004	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2004, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes

No

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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 2004?

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 2004?

☐☐

Did you have any children under age 14 on January 1, 2005 with interest and dividend income in excess of \$800, or total investment income in excess of \$1,600?

☐☐

Has the IRS sent you Form 8836, Qualifying Children Residency Statement?

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?

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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 in 2004?

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| ☐ | ☐ | Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2005? |
| ☐ | ☐ | 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

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|--------------------------|--------------------------|---|
| ☐ | ☐ | 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

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|--------------------------|--------------------------|--|
| ☐ | ☐ | 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? |

ITEMIZED DEDUCTIONS

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| ☐ | ☐ | Did you purchase any motor vehicles or boats in 2004? If so, please provide documentation containing the sales tax paid. |
| ☐ | ☐ | 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

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|--------------------------|--------------------------|--|
| ☐ | ☐ | Did you apply an overpayment of 2003 taxes to your 2004 estimated tax (instead of being refunded)? |
| ☐ | ☐ | If you have an overpayment of 2004 taxes, do you want the excess applied to your 2005 estimated tax (instead of being refunded)? |

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☐	☐	Do you expect your 2005 taxable income and withholdings to be different from 2004?
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MISCELLANEOUS

☐	☐	Do you want to electronically file your tax return?
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☐	☐	Do you want to allocate \$3 to the Presidential Election Campaign Fund?
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☐	☐	Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
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☐	☐	Do you want to allow another person to discuss your return with the IRS?
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☐	☐	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?
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☐	☐	Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
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☐	☐	Was your home rented out or used for business?
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☐	☐	Did you establish a health savings account (HSA) this year?
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☐	☐	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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☐	☐	Did you incur moving expenses due to a change of employment?
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☐	☐	Did you engage the services of any household employees?
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☐	☐	Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
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☐	☐	Did you or your spouse make any gifts to an individual that total more than \$11,000, or any gifts to a trust?
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