

2006	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2006, please check the appropriate box and provide additional information if necessary.

**PERSONAL 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"/> | Could you be claimed as a dependent on another person's tax return for 2006? |

**DEPENDENTS**

Yes No

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents?  |
| <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 2006?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 18 on January 1, 2007 with interest and dividend income in excess of \$850, or total investment income in excess of \$1,700? |
| <input type="checkbox"/> | <input type="checkbox"/> | Has the IRS sent you Form 8836, Qualifying Children Residency Statement?   |

**INCOME**

Yes No

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes?  |

**PURCHASES, SALES AND DEBT**

Yes No

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 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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<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
<input type="checkbox"/>	<input type="checkbox"/>		Did you buy or sell any stocks, bonds or other investment property in 2006?
<input type="checkbox"/>	<input type="checkbox"/>		Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
<input type="checkbox"/>	<input type="checkbox"/>		Did you have any debts cancelled or forgiven?
<input type="checkbox"/>	<input type="checkbox"/>		Did anyone owe you money which had become uncollectible?
<b>RETIREMENT PLANS</b>			
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>		Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>		Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from a retirement plan that was subsequently rolled over into another retirement account within 60 days of receiving the distribution?
<b>EDUCATION</b>			
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
<input type="checkbox"/>	<input type="checkbox"/>		Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
<b>ITEMIZED DEDUCTIONS</b>			
Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		Did you incur a loss because of damaged or stolen property?
<input type="checkbox"/>	<input type="checkbox"/>		Did you work out of town for part of the year?
<input type="checkbox"/>	<input type="checkbox"/>		Did you use your car on the job (other than to and from work)?
<b>ESTIMATED TAXES</b>			
Yes	No		

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☐ ☐ Did you apply an overpayment of 2005 taxes to your 2006 estimated tax (instead of being refunded)?

☐ ☐ If you have an overpayment of 2006 taxes, do you want the excess applied to your 2007 estimated tax (instead of being refunded)?

☐ ☐ Do you expect your 2007 taxable income and withholdings to be different from 2006?

### MISCELLANEOUS

Yes No

☐ ☐ 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 your tax return with your tax 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 (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary?

☐ ☐ Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage 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?

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|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$11,000, or any gifts to a trust?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you add any energy efficient improvements (insulation systems, exterior windows and doors, metal roofs) to your home in 2006?                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new hybrid vehicle in 2006?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have long-distance telephone service after February 28, 2003, and before August 1, 2006?  |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of taxes, do you want your refund directly deposited to more than one financial account (checking, savings, and retirement)? |

**TAX RELIEF FOR HURRICANE VICTIMS**

Yes      No

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were you in an area impacted by Hurricane Katrina, Rita, or Wilma?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you take a distribution from an eligible retirement plan due to economic loss from Hurricane Katrina, Rita, or Wilma?                          |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you provide at least 60 consecutive days of housing in your principal residence, free of charge, for a Hurricane Katrina displaced individual? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any non-business debt that was discharged due to the Hurricane Katrina?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any payments due to Hurricane Katrina, Rita, or Wilma? (These payments may or may not be taxable.)                                 |