

2010	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2010,
Please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes	No	
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- | | | |
|--------------------------|--------------------------|--|
| <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 2010? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in the number or status of dependents this year? |
| <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 2010? |
| <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 2010, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay for child care or dependent care expenses, so that you and/or your spouse, could work or continue your education? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay into and/or receive pretax dependent care benefits through your employer? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a still born child this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you provide a home for a parent, parents, or ancestral parent(s) that required assistance with activities of daily living? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay more than \$800 in residential care, assisted living or other medical costs for any Arizona resident aged 65 years old or more? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you adopt or have a pending adoption this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest on behalf of a dependent? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you not claim a dependent, in order to allow your dependent to claim the federal education credit? |

INCOME

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

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Yes No

- ☐ ☐ 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?
- ☐ ☐ Did you have any Arizona Lottery winnings in 2010?
- ☐ ☐ Did you have any unemployment compensation in 2010?
- ☐ ☐ Did you receive compensation as a result of Active US Armed Services, National Guard or Reservist Service?
- ☐ ☐ Did you receive any income or buy or sell property in any state` other than Arizona?

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 in 2010?

If assets have been sold, please provide information, so that we may determine the cost basis and date of purchase of the assets.

- ☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please provide a copy of the closing documents.
- ☐ ☐ Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements?
- ☐ ☐ Did you pay sales tax on the purchase of one or more new mobile homes, motor vehicles, or recreational vehicles? If so, please provide a copy of the bill(s) of sale. If the vehicle qualifies for a tax credit, please advise
- ☐ ☐ Did you purchase a new alternative motor vehicle (hybrid, advanced lean burn, fuel cell, plug-in)?
- ☐ ☐ Did you have any debts cancelled or forgiven? If so, please include related documents and any Forms 1099-C or 1099-A
- ☐ ☐ Did anyone owe you money which had become uncollectible?

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Yes No

- ☐ ☐ If you own any rental properties (commercial or residential), have you filed the required sales tax reports? **NOTE: For 2011 you will be required to file Form 1099 for your rental activities.**

RETIREMENT PLANS

- ☐ ☐ Did you receive a distribution from a profit-sharing, retirement plan or individual retirement arrangement (including Traditional, 401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If yes, please provide Form(s) 1099-R.
- ☐ ☐ Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, ROTH etc.)? In what amount? _____ Date(s): _____
- ☐ ☐ If it will benefit you, would you want to contribute to an IRA, SEP or SIMPLE IRA or to a ROTH IRA?
- ☐ ☐ Did you transfer any amount from one retirement plan to another retirement plan?
- ☐ ☐ Did you receive a distribution from a retirement plan that you subsequently rolled over into another retirement plan within 60 days of receiving the distribution? If so, we will need the related documentation of the withdrawal and rollover.
- ☐ ☐ Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?
- ☐ ☐ Did you take retirement distributions due to the financial demands caused by being called to Active Military Service?
- ☐ ☐ Did you do a direct transfer from an IRA to a charitable organization?
- ☐ ☐ Will you or have you attain age 70- ½ in 2011? If so, please the value of all of your IRA accounts as of 12/31/2010. \$ _____
- ☐ ☐ Will your spouse or has your spouse attain age 70- ½ in 2011? If so, please the value of all of your spouses IRA accounts as of 12/31/2010. \$ _____
- ☐ ☐ If you are self-employed, do you maintain a Money Purchase or Profit Sharing Plan? If so, please provide a copy of the 12/31/2010 investment account statement for your plan.

EDUCATION

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

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Yes No

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If yes, please provide all tax related forms. Which year of studies (freshmen, sophomore, junior or senior) was the student considered in 2010?

☐ ☐ Did you incur any unreimbursed expenses working as a teacher, counselor, or principal for classes, kindergarten through grade 12? If so, in what amount?

☐ ☐ Did you contribute to any Section 529 plan during 2010? If so, in what amount(s)? _____ Date(s) _____

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)?

☐ ☐ Did you pay any deductible investment interest in 2010 This would be interest on a loan where you used the proceeds to purchase an investment; or interest on a loan that is secured by investment property, such as a margin loan from a securities brokerage firm.

☐ ☐ Did you pay any property taxes on any real property? If yes, please provide information.

☐ ☐ Did you pay out of pocket medical, dental, or prescription drug expenses not covered by health insurance or a flexible spending account?

ESTIMATED TAXES

☐ ☐ Did you apply an overpayment of 2009 taxes to your 2010 estimated tax (instead of being refunded)?

☐ ☐ If you have an overpayment of 2010 taxes, do you want the excess applied to your 2011 estimated tax (instead of being refunded)?

☐ ☐ Do you expect your 2011 taxable income and withholdings to be different from 2010? If not, please describe any anticipated changes.

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CREDITS

Yes No

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| <input type="checkbox"/> | <input type="checkbox"/> | Did you add any energy efficient improvements (insulation, exterior windows, doors or metal roof) to your home in 2010? If so, please provide receipts. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a State Qualified Organization that provides Assistance to the Working Poor ? If so, please provide a copy of the receipt. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a Public or Charter School for the support of Extracurricular Activities for Arizona tax credit of \$200 (single) or \$400 (married filing joint) ? If yes, how much did you contribute? \$ _____. Please provide a copy of the receipt. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a School Tuition Organization that provides Scholarships and/or Grants to Qualified Schools for the Arizona Tax Credit of up to \$500 (single) or \$1,000 (married filing jointly) ? If yes, how much did you contribute? _____. Please provide a copy of your receipt. |
| <input type="checkbox"/> | <input type="checkbox"/> | If you did not fund the School Tuition Organization credit prior to the end of the year, would you like to fund it before April 15th, 2010 to take advantage of the credit for 2010? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to the Military Family Relief Fund eligible for the Arizona Tax Credit of up to \$200 (single) or \$400 (married filing jointly) ? If yes, how much did you contribute? \$ _____. Please provide a copy of the receipt. Please NOTE the Military Family Relief Fund by statute had a participation cap of \$1 Million, once reached you will not be able to receive a credit for the donation. It may still be considered for a charitable contribution deduction. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you invest in a Limited/General Partnership that provides Tax Credits or substantial first year tax deductions? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur expenses to purchase and install an qualified water conservation system? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for net increases in qualified employment in an Enterprise Zone? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for expenses incurred in constructing a qualified environmental technology manufacturing, producing or processing facility? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for net increases in employment of full time employees by a taxpayer in a Military Reuse Zone? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for increased research activities in 2010? |

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Yes No

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| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a credit for purchase and installation of an agricultural water conservation system? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company install a solar hot water plumbing stub-out or electric vehicle recharging outlet in a house or dwelling unit you constructed? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase real or personal property used in an Arizona trade or business to control or prevent pollution? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you employ a Temporary Assistance for Needy Families (TANF) recipient? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for expenses incurred to purchase agricultural pollution control equipment? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for a business operating a Health Forest Enterprise? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you employ a member of the Arizona National Guard that was placed on Active Duty in 2010? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your company receive a credit for expanding or locating qualified renewable energy operations in Arizona |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you own a company that produced motion pictures, commercials, or other productions in Arizona? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make an investment in a Qualified Small Business in 2010? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you think you qualify for any other Federal or State Tax credit that is not listed here or discussed elsewhere in your Tax Organizer? Please provide details. _____ |

MISCELLANEOUS

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|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an Arizona State refund, do you wish to contribute any portion of the refund to a political party or charity? If so, how much \$ _____ and to which organization _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you paying interest on a loan for a boat or recreational vehicle that has basic living accommodations, such as sleeping, restroom and cooking facilities? |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer? |

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Yes No

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| <input type="checkbox"/> | <input type="checkbox"/> | 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, foreign annuity or other financial account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you own shares of stock in a foreign corporation, or own property in a foreign country? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to a foreign trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert an existing fireplace to any of the following? If yes, please provide receipts. a)Qualified Wood Stove, b)Qualified Wood Fireplace or, c) Gas Fired Fireplace? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your homebuilder pass on to you, the deduction for the construction of a Energy Efficient Residence? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you donate real property and improvements, to a school district or a charter school, for use as a school? |
| <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 receive any benefits as a result of being a Volunteer Firefighter or Emergency Medical Responded? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay Primary Mortgage Insurance Premiums (PMI) on a mortgage? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any household employees to whom you paid more than \$1,700 in 2010? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make contributions to a Health Savings Account (HSA) this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have distributions from a Health Savings Account (HSA) this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you sold an asset for which Bonus Depreciation or the IRS Section 179 deduction was not allowed on the state return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you withdraw from your Arizona County, City or School Retirement System contributions early? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a federal or state pension? If so, please provide the Form 1099-R |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay medical expenses for someone you could not claim as a dependent? |

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Yes No

☐ ☐ Did you refinance a home loan for which the points from the prior loan, have not been completely amortized?

☐ ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency? If so, please provide a copy of the notice or report

☐ ☐ Did you or your spouse make any gifts to an one individual that totaled more than \$13,000, or any gifts to a trust?

☐ ☐ Did you inherit or purchase any property in 2010? If yes, please provide details.

☐ ☐ Did you or your spouse receive a \$250 economic recovery payment in 2010 that was made to social security recipients, railroad retirement recipients and certain veterans? Caution: **Most eligible recipients received the \$250 payment in 2009 instead of 2010. Check the box only if the payment was received in 2010.**

☐ ☐ Did you receive a pension or annuity in 2010 for services performed as an employee of the U.S., state or local government from work not covered by social security?

☐ ☐ Did your spouse receive a pension or annuity in 2010 for services performed as an employee of the U.S., state or local government from work not covered by social security?

☐ ☐ Were you (or your spouse) the beneficiary of COBRA Premium Assistance for any month during 2010?

☐ ☐ Do you think you qualify for any other Federal or State Tax expense deduction that is not listed here or discussed elsewhere in your Tax Organizer? Please provide details.

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