

2011	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2011,
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 2011? |

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 2011? |
| <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 2011, 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 a child this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any student loan interest on behalf of a dependent or yourself? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you not claim a dependent on your federal return, 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	
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| <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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any Arizona Lottery winnings in 2011? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive compensation as a result of Active US Armed Services, National Guard or Reservist Service? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any income or buy or sell property in any state other than Arizona? |

PURCHASES, SALES AND DEBT

- | | | |
|--------------------------|--------------------------|---|
| <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? |
| <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 sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 day of 2012? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a home in 2011 while you were overseas on official extended duty?? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property in 2011? |

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

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|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take out a home equity loan? If so, please provide a copy of the closing documents. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new alternative motor vehicle (hybrid, advanced lean burn, fuel cell, plug-in)? |

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|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? If so, please include related documents and any Forms 1099-C or 1099-A |
| <input type="checkbox"/> | <input type="checkbox"/> | Did anyone owe you money which had become uncollectible? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you own any rental properties (commercial or residential), have you filed the required sales tax reports? NOTE: For 2012 you may be required to file Form 1099 for your rental activities. |

RETIREMENT PLANS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, ROTH etc.)? In what amount? _____ Date(s): _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | If it will benefit you, would you want to contribute to an IRA, SEP or SIMPLE IRA or to a ROTH IRA? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another retirement plan? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2011? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you take retirement distributions due to the financial demands caused by being called to Active Military Service? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you do a direct transfer from an IRA to a charitable organization? If, so how much \$ _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Will you or have you attained age 70- ½ in 2012? If so, please provide the value of all of your IRA accounts as of 12/31/2011. \$ _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Will your spouse or has your spouse attained age 70- ½ in 2012? If so, please the value of all of your spouses IRA accounts as of 12/31/2011. \$ _____ |

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Yes No

- ☐ ☐ If you are self-employed, do you maintain a Money Purchase or Profit Sharing Plan? If so, please provide a copy of the 12/31/2011 investment account statement for your plan.

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? If yes, please provide all tax related forms. Which year of studies (freshmen, sophomore, junior or senior) was the student considered in 2011?
- ☐ ☐ 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 2011? If so, in what amount(s)? _____ Date(s) _____

ITEMIZED DEDUCTIONS

- ☐ ☐ 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 2011 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 2010 taxes to your 2011 estimated tax (instead of being refunded)?
- ☐ ☐ If you have an overpayment of 2011 taxes, do you want the excess applied to your 2012 estimated tax (instead of being refunded)?

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Yes No

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Do you expect your 2012 taxable income and withholdings to be different from 2011? If not, please describe any anticipated changes.

CREDITS

☐☐

Did you add any energy efficient improvements (insulation, exterior windows, doors or metal roof) to your home in 2011? If so, please provide receipts.

☐☐

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.

☐☐

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.

☐☐

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.

☐☐

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 17th, 2012 to take advantage of the credit for 2011?

☐☐

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.**

☐☐

Did you invest in a Limited/General Partnership that provides Tax Credits or substantial first year tax deductions?

☐☐

Did you hire individuals in 2011 that are part of the targeted group under the Work Opportunity Credit? If unsure, mark "yes".

☐☐

Did you incur any qualified clinical testing expenses for the testing of certain drugs for rare diseases or conditions generally referred to as "orphan drugs? If unsure, mark "yes".

☐☐

Did you purchase a qualified electric vehicle that was placed in service before 2012?

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Yes No

☐ ☐ Did you purchase a solar system, small wind fuel cell or geothermal heat pump property in 2011, for your primary residence or second home?

☐ ☐ Did you purchase a hybrid vehicle after 2006 and before 12/31/2011. If so, please provide the year, make, model and placed in service date.

☐ ☐ Did your company purchase real or personal property that is used within Arizona, in your trade or business to control or prevent pollution?

☐ ☐ Did you or your company receive a credit for increased research activities related to solar liquid fuel?

☐ ☐ Did you or your company install solar energy devices for personal, commercial or industrial use?

☐ ☐ Did you or your company receive a credit for net increases in qualified employment in an Enterprise Zone prior to June 30th, 2011?

☐ ☐ Did you or your company donate real property or improvements to an Arizona school district or Arizona charter school for use as a school or as a site for the construction of a school?

☐ ☐ Did you receive a credit for purchase and installation of an agricultural water conservation system?

☐ ☐ Did you receive a credit for purchase and installation of an water conservation system for your residence located in Arizona?

☐ ☐ 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?

☐ ☐ Did you purchase real or personal property used in an Arizona trade or business to control or prevent pollution?

☐ ☐ Did you employ a Temporary Assistance for Needy Families (TANF) recipient?

☐ ☐ Did you or your company receive a credit for expenses incurred to purchase agricultural pollution control equipment?

☐ ☐ Did you or your company receive a credit for a business operating a Health Forest Enterprise?

☐ ☐ Did you employ a member of the Arizona National Guard that was placed on Active Duty in 2011?

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Yes

No

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Did you or your company receive a credit for expanding or locating qualified renewable energy operations in Arizona

☐☐

Did you own a company that produced motion pictures, commercials, or other productions in Arizona?

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Did you make an investment in a Qualified Small Business in 2011?

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Do you have any unused defense contracting credits remaining in 2011?

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Do you have any unused enterprise zone credits remaining in 2011?

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Do you have any unused environmental technology facility credits remaining in 2011?

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Do you have any unused military reuse zone credits remaining in 2011?

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Do you have any unused recycling equipment credits remaining in 2011?

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Do you have any unused increased research activities credits remaining in 2011?

☐☐

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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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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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 _____

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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?

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May the IRS discuss your tax return with your preparer?

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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, foreign annuity or other financial account?

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Do you own shares of stock in a foreign corporation, or own property in a foreign country?

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| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to a foreign trust or did you have an interest in any foreign assets or accounts? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new home between April 9th, 2008 and before July 1st, 2009 and take the First Time Home Buyers Credit? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert a gas or hybrid vehicle to electric in 2011? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you employ fewer than 25 full-time equivalent employees, paying on average less than \$50,000 per employee and pay at least 50% of the cost of single health insurance coverage for those employees? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you considered totally or partially blind? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new home after Jan 1st, 2009, close before Sept 30th, 2010, take the First Time Home Buyers Credit and then sell the home within 3 years? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 an account holder? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are 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? |
| <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"/> | 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 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 2011? |
| <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? |

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| <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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did incur a casualty loss (sudden, unexpected and unusual in nature)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did incur a theft loss (including larceny, robbery and embezzlement)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did incur any investor expenses to produce, collect, conserve, manage or maintain income-producing property or investments? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you refinance a home loan for which the points from the prior loan, have not been completely amortized? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to any one individual that totaled more than \$13,000, or any gifts to a trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you inherit or purchase any property in 2011? If yes, please provide details. |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
