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## FREE TAX REVIEW QUESTIONNAIRE

Please complete the attached tax review form and submit with:

1. Copies of your past 3 (or 4 if available) years of tax returns
2. Copies of Closing Settlement Statement for all Real Estate transactions
3. For all businesses for each year being reviewed:

Your QuickBooks file (**Backup NOT Accountant's copy**)

OR

Your Year End Financials which should include:

- Profit & Loss (a.k.a. Income Statement)
- Balance Sheet
- General Ledger

Date \_\_\_\_\_

Primary contact for our questions: Name \_\_\_\_\_ Phone \_\_\_\_\_

**TAXPAYER:**

**SPOUSE:**

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Suffix \_\_\_\_\_  
 Birth date \_\_\_\_\_ Social Security# \_\_\_\_\_  
 Work Phone \_\_\_\_\_ Extension \_\_\_\_\_  
 Current Home Address \_\_\_\_\_ Apt No \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Fax: \_\_\_\_\_ Cell # \_\_\_\_\_

**WHICH YEARS?  
(PLEASE CIRCLE)**

- |  |      |      |                             |
|--|------|------|-----------------------------|
| 1. Do you have any returns currently being reviewed by the IRS? Yes___ No___   | 2007 | 2008 | 2009                        |
| 2. Do you owe the IRS? Yes___ No___<br>If yes, how much do you owe the IRS? \$ _____   | 2007 | 2008 | 2009<br>other year(s) _____ |
| 3. Are you current on all tax payments owed to the IRS? Yes___ No___   |      |      |                             |
| 4. Do you know of any errors or omissions on your originally filed return? Yes___ No___<br>Explanation: _____  | 2007 | 2008 | 2009                        |
| 5. Are all your dependent children listed on your most recent tax return? Yes___ No___   | 2007 | 2008 | 2009                        |
| 6. Did you provide over 50% support for anyone that you did not claim as a dependent?  | 2007 | 2008 | 2009                        |
| 7. Did you work at least 900 hours during the school year as a K-12 teacher, counselor, Principal or aide in a public or private school?                         | 2007 | 2008 | 2009                        |
| 8. Did you or any of your dependents incur secondary/college expenses? Yes___ No___  | 2007 | 2008 | 2009                        |
| 9. Did you or your spouse pay interest on a student loan? Yes___ No___   | 2007 | 2008 | 2009                        |
| 10. Do you own your own home? Yes___ No___   | 2007 | 2008 | 2009                        |
| 11. Do you own a second home? Yes___ No___   | 2007 | 2008 | 2009                        |
| 12. Do you own a recreational vehicle boat or plane? Yes___ No___ Type _____   | 2007 | 2008 | 2009                        |
| 13. Do you own rental properties? Yes___ No___   | 2007 | 2008 | 2009                        |
| 14. Did you buy, sell, or refinance your home or other real estate? Yes___ No___<br>If yes, please provide a copy of your settlement statement with this review. | 2007 | 2008 | 2009                        |
| 15. Did you move your residence this year AND start work at a new location? Yes___ No___   | 2007 | 2008 | 2009                        |
| 16. Did you have any stock that was declared worthless? Yes___ No___   | 2007 | 2008 | 2009                        |

	<b>WHICH YEARS? (PLEASE CIRCLE)</b>
	2007    2008    2009
<b>17.</b> Did you have damages or loss due to weather, theft, or other circumstances? Yes___ No___ If yes, how much total \$_____	2007    2008    2009
<b>18.</b> Do you have any non-reported gambling (Lottery) losses? Yes___ No___	2007    2008    2009
<b>19.</b> Do you have any un-collectable debts? Yes___ No___ Are these business or non-business debts? _____	2007    2008    2009
<b>20.</b> Did you operate an in-home day care for profit? Yes___ No___	2007    2008    2009
<b>21.</b> Do you or your spouse own all or part of any other business(es)? Yes___ No___ If No, SKIP TO #33 If Yes, detail: _____	2007    2008    2009
<b>22.</b> What is the legal structure of your business(es)? (check all that apply) Sole Proprietorship___ Partnership___ S-Corp___ C-Corp___ LLP___ LLC___	
<b>23.</b> Does either taxpayer use an office at home? Yes___ No___ For what business: _____ Was this claimed on tax return? Yes___ No___	2007    2008    2009
<b>24.</b> Did you have any home office or business deductions that weren't reported? Yes___ No___ Explanation: _____	2007    2008    2009
<b>25.</b> Did either taxpayer drive their vehicle for business? Yes___ No___ For what business: _____ Was this claimed on your tax return? Yes___ No___	2007    2008    2009
<b>26.</b> Did any employees ever use their personal vehicle for business related activities, deposits, errands, etc.? Yes___ No___ Did you reimburse mileage? Yes___ No___	2007    2008    2009
<b>27.</b> Did either taxpayer use any/all of the following for business? Yes___ No___ Internet___ Home Phone___ Business lines___ Cell Phone___ Pager___ Fax___	2007    2008    2009
<b>28.</b> Did either taxpayer travel for business? Yes___ No___	2007    2008    2009
<b>29.</b> Did you entertain for business? Yes___ No___ Was this claimed on tax return? Yes___ No___	2007    2008    2009
<b>30.</b> Did you pay for your own or employees health insurance? Yes___ No___	2007    2008    2009
<b>31.</b> Do you have any un-collectable business debts? Yes___ No___	2007    2008    2009
<b>32.</b> What were your tax preparation fees for the following years? 2006 - \$_____ 2007 - \$_____ 2008 - \$_____ 2009 - \$_____	