

Questions

Please check the appropriate box and include all necessary details.

Yes No

Personal Information

Did your marital status change during the year?

— —

If yes, explain: _____

Did your address change from last year?

— —

Can you be claimed as a dependent by another taxpayer?

— —

Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?

— —

Yes No

Dependent Information

Were there any changes in dependents from the prior year?

— —

If yes, explain: _____

Do you have any children under age 18 with unearned income in excess of \$1700?

— —

Did you pay for child care while you worked or looked for work?

— —

Yes No

Purchases, Sales, and Debt Information

Did you start a new business or purchase rental property during the year?

— —

Did you acquire a new or additional interest in a partnership or S corporation?

— —

Did you sell, exchange, or purchase any real estate during the year?

— —

Did you acquire or dispose of any stock during the year?

— —

Did you take out a home equity loan this year?

— —

Did you refinance a principal residence or second home this year?

— —

Did you sell an existing business, rental, or other property this year?

— —

Did you purchase a new hybrid or alternative motor vehicle this year?

— —

Did you pay any student loan interest this year?

— —

Yes No

Income Information

Did you have any foreign income or pay any foreign taxes during the year?

— —

Did you receive any income from property sold prior to this year?

— —

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

— —

Did you make any withdrawals from or contributions to an IRA, Keogh, SIMPLE, or SEP account?

— —

Did you make any withdrawals from an education savings or 529 Plan account?

— —

Did you receive any disability income during the year?

— —

Did any of your life insurance policies mature, or did you surrender any policies?

— —

Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

— —

Yes No

Itemized Deduction Information

Did you incur a casualty or theft loss during the year?

— —

Do you have evidence to substantiate charitable contributions?

— —

Did you make any noncash charitable contributions (clothes, furniture, vehicles, etc.)?

— —

Did you have an expense account or allowance during the year?

— —

Did you use your car on the job, for other than commuting?

— —

Did you work out of town for part of the year?

— —

Did you have any educational expenses during the year?

— —

Did you have any expenses related to seeking a new job during the year?

— —

Did you make any major purchases during the year (cars, boats, etc.)?

— —

Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?

— —

Yes No

Miscellaneous Information

Did you make gifts of more than \$12,000 to any individual?

— —

Did you make any contributions to an education savings or 529 Plan account?

— —

Did you pay long-term health care premiums for yourself or your family?

— —

Did you engage in any bartering transactions?

— —

Are you covered by a pension or retirement plan?

— —

Did you retire or change jobs this year?

— —

Did you incur moving costs because of a job change?

— —

Please check the appropriate box and include all necessary details.

Yes No

Miscellaneous Information, Continued

Did you make energy efficient improvements to your main home this year?

— —

Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?

— —

Did you receive correspondence from the State or Internal Revenue Service?

— —

If yes, explain: _____

Do you want to designate \$3 to the Presidential Election Campaign Fund?

— —

If you check yes, it will not change your tax or reduce your refund.

General: 1040 **Personal Information**

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) _____
 Mark if you were married but living apart all year _____

	Taxpayer	Spouse
Social security number	_____	_____
First name	_____	_____
Last name	_____	_____
Occupation	_____	_____
Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank)	_____	_____
Mark if legally blind	_____	_____
Mark if dependent of another taxpayer	_____	_____
Date of birth	_____	_____
Date of death	_____	_____
Work/daytime telephone number/ext number	_____	_____
Do you authorize us to discuss your return with the IRS (1 = Yes, 2 = No)	_____	_____

General: 1040 **Present Mailing Address**

Address _____
 Apartment number _____
 City/State postal code/Zip code _____
 Home/evening telephone number _____
 Email address _____

General: 1040 **Dependent Information**

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months lived in your home	Care expenses paid for dependent
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Credits: 2441 **Child and Dependent Care Expenses**

	Provider #1	Provider #2
Provider information:		
Name	_____	_____
Street address	_____	_____
City, state, and zip code	_____	_____
Social security number OR Employer identification number	_____	_____
Mark if provider is a tax-exempt organization	_____	_____
Amount paid to care provider in 2007	_____	_____
	Taxpayer	Spouse
Employer-provided dependent care benefits that were forfeited	_____	_____

General: Info **Direct Deposit/Electronic Funds Withdrawal Information**

If you would like to have a refund deposited directly or a balance due debited directly into/from your bank account, please enter the following information:

Financial institution routing transit number _____
 Name of financial institution _____
 Your account number _____
 Type of account (1 = Savings, 2 = Checking, 3 = IRA*) _____

*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

Income: W2 **Salary and Wages**

Please provide all copies of Form W-2 that you receive.

Below is a list of the W-2's as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—

Income: 1099 **Pension, IRA, and Annuity Distributions**

Please provide all copies of Form 1099-R that you receive.

Below is a list of the 1099-R's as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—

Income: K1, K1T **Schedule K-1s**

Please provide all copies of Schedule K-1s that you receive.

Below is a list of the K-1s as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box.

T/S/J	Description	Form	Mark if no longer applicable
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—

Income: W2G **Gambling Income**

Please provide all copies of Form W-2G that you receive.

Below is a list of the W-2Gs as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—
—	_____	_____	—

Educate: 1099Q **Qualified Education Plan Distributions**

Please provide all copies of Form 1099-Q that you receive.

Below is a list of the 1099-Q's as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
—	_____	_____	—
—	_____	_____	—

Income: B1 **Interest Income**

Please provide all copies of Form 1099-Int.

T/S/J	Payer Name	Interest Income	Prior Year Information
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Income: B3 **Seller Financed Mortgage Interest**

T, S, J Payer's name _____ Payer's social security number _____
 Payer's address _____ Amount received in 2006 _____
 Amount received in 2007 _____

Income: B2 **Dividend Income**

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Income: D **Sales of Stocks, Securities, and Other Investment Property**

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Income: Inc **Other Income**

Please provide copies of all supporting documentation.

	2007 Information		Prior Year Information
	Taxpayer	Spouse	Prior Year Information
State and local income tax refunds	_____	_____	_____
Alimony received	_____	_____	_____
Unemployment compensation	_____	_____	_____
Unemployment compensation repaid	_____	_____	_____
Social security benefits	_____	_____	_____
Medicare premiums to be reported on Schedule A	_____	_____	_____
Railroad retirement benefits	_____	_____	_____
Other Income:			
T/S/J		2007 Information	Prior Year Information
_____		_____	_____
_____		_____	_____

1040 Adj: IRA

Adjustments to Income - IRA Contributions

Please provide year end statements for each account and any Form 8606 not prepared by this office.

	Taxpayer	Spouse
Traditional IRA Contributions for 2007 -		
If you want to contribute the maximum allowable traditional IRA contribution amount, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)		
Enter the total traditional IRA contributions made for use in 2007	_____	_____
Roth IRA Contributions for 2007 -		
Mark if you want to contribute the maximum Roth IRA contribution		
Enter the total Roth IRA contributions made for use in 2007	_____	_____

Educate: Educ2

Higher Education Deductions and/or Credits

Complete this section if you paid interest on a qualified student loan in 2007 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2007 Information	Prior Year Information
_____	_____	_____	_____
_____	_____	_____	_____

Complete this section if you paid qualified education expenses for higher education costs in 2007. Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.

Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

*Education Expense Code: 1 = Hope credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction

The student qualifies for the Hope Credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 2 years of post-secondary education; has had no drug convictions in 2007 and has not claimed the Hope credit in more than one prior tax year.

1040 Adj: 3903

Job Related Moving Expenses

Complete this section if you moved to a new home because of a new principal work place.

Description of move _____

Taxpayer/Spouse/Joint (T, S, J) _____

Mark if the move was due to service in the armed forces _____

Number of miles from old home to new workplace _____

Number of miles from old home to old workplace _____

Mark if move is outside United States or its possessions _____

Transportation and storage expenses _____

Travel and lodging (not including meals) _____

Total amount reimbursed for moving expenses _____

1040 Adj: Other

Other Adjustments to Income

Alimony Paid:

T/S	Recipient name	Recipient SSN	2007 Information	Prior Year Information
_____	_____	_____	_____	_____
	Address _____	City _____	State _____	Zip code _____
		Taxpayer	Spouse	Prior Year Information

Educator expenses:

_____	_____	_____	_____
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Other adjustments:

_____	_____	_____	_____
_____	_____	_____	_____

Itemized: A1

Medical and Dental Expenses

T/S/J		2007 Information	Prior Year Information
—	Medical and dental expenses	_____	_____
—	Medical insurance premiums you paid	_____	_____
—	Long-term care premiums you paid	_____	_____
—	Prescription medicines and drugs	_____	_____
—	Miles driven for medical items	_____	_____

Itemized: A1

Tax Expenses

T/S/J		2007 Information	Prior Year Information
—	State/local income taxes paid	_____	_____
—	2006 state and local income taxes paid in 2007	_____	_____
—	Sales tax paid on actual expenses	_____	_____
—	Real estate taxes paid	_____	_____
—	Personal property taxes	_____	_____
—	Other taxes	_____	_____

Itemized: A2

Interest Expenses

T/S/J		2007 Information	Prior Year Information
—	Home mortgage interest: From Form 1098	_____	_____
Other, such as: Home mortgage interest paid to individuals			
T/S/J	Name	SSN	2007 Information
—	_____	_____	_____
Address _____		_____	_____
T/S/J		2007 Information	Prior Year Information
—	Investment interest expense, other than on K-1s:	_____	_____
		Refinance #1	Refinance #2
Refinancing Information:			
T/S/J		—	—
Description	_____	_____	_____
Total points paid	_____	_____	_____
Date of refinance	_____	_____	_____
Total number of payments	_____	_____	_____
Reported on Form 1098 in 2007	_____	_____	_____

Itemized: A3

Charitable Contributions

T/S/J		2007 Information	Prior Year Information
—	Contributions made by cash or check	_____	_____
—	Volunteer miles driven	_____	_____
—	Noncash items, such as: Goodwill, Salvation Army	_____	_____

Itemized: A3

Miscellaneous Deductions

T/S/J		2007 Information	Prior Year Information
—	Unreimbursed expenses	_____	_____
—	Union dues	_____	_____
—	Tax preparation fees	_____	_____
—	Other expenses, subject to 2% AGI limitation:	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	Safe deposit box rental	_____	_____
—	Investment expenses, other than on K1s:	_____	_____
—	Other expenses, not subject to the 2% AGI limitation:	_____	_____
—	_____	_____	_____
—	_____	_____	_____
—	Gambling losses: (Enter only if you have gambling income)	_____	_____