

QUESTIONNAIRE

Did your filing status change during 2008 ? YES NO

Will the address on your 2008 Federal return be different from the one shown on your 2007 return? YES NO

If YES, enter the New Address:

Street _____

City _____

State _____ Zip Code _____

Were you notified by the Internal Revenue Service or any other taxing authority of changes to a prior year tax return? YES NO

(If YES, please enclose report notifying you of the change(s).)

Are you aware of any changes to your income, deductions and credits reported on a prior year return? YES NO

Did you sell and/or purchase a principal residence in 2008 ? YES NO

Did you receive any insurance or other reimbursement from a prior year medical, casualty, or theft loss deduction? YES NO

Do you have any dependent children under 18 who received unearned income (interest, dividends, investment income) of over \$1,700? YES NO

If YES, and if your child qualifies, do you elect to report your child's interest and dividends in your income tax return? YES NO

Did you or your spouse receive stock from an employer's stock bonus plan (do not include amounts reported on Form W-2)? YES NO

Did you buy or sell any bonds during the year? YES NO
(If YES, please provide a copy of the broker's report.)

Did you start a new business during 2008 ? YES NO

Did you receive payments from a pension or profit-sharing plan? YES NO

Did you sell business or personal property(ies) on the installment method, OR did you receive payments from an installment sale? YES NO
(If YES, please provide details)

Did you surrender any U.S. savings bonds during 2008 ? YES NO

Did you use the proceeds from Series EE U.S. savings bonds purchased after 1989 to pay for higher education expenses? YES NO

Did you receive tip income NOT reported to your employer? YES NO

Did you receive any tax-exempt interest? YES NO

Did you obtain a loan and use the proceeds for an investment? YES NO

QUESTIONNAIRE

If employed, are you covered under a pension, profit-sharing, stock bonus or other retirement plan? ___ YES ___ NO

Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? ___ YES ___ NO

Did you rollover any amount from a Traditional IRA to a Roth IRA during 2006, 2007, or 2008? ___ YES ___ NO

Did you receive any disability payments this year? ___ YES ___ NO

If either you or your spouse are self-employed, are either of you covered under an employers health plan at another job? ___ YES ___ NO

Did you have foreign income or pay any foreign taxes in 2008? ___ YES ___ NO

Did you sell property or equipment on installment in 2008? ___ YES ___ NO

Did you have any business related educational expenses? ___ YES ___ NO

Did you make gifts of more than \$12,000 to any individual? ___ YES ___ NO

Did you make gifts to a trust? ___ YES ___ NO

Did you suffer an uninsured casualty of theft loss on a non-business property? ___ YES ___ NO

Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are paid to beneficiaries named by you? ___ YES ___ NO

Did you receive any income not included in the Tax Organizer? ___ YES ___ NO

Did you pay any qualifying education expenses for yourself or any dependents? ___ YES ___ NO

Notes: _____

Please make certain to report all income received in 2008. If you received income that is not included in this proforma organizer, attach a schedule listing the income received. Also, describe the nature of the income received (type of income, how received, etc.).