

QUESTIONNAIRE

Did your filing status change during 2009 ? ___ YES ___ NO

Will the address on your 2008 Federal return be different from the one shown on your 2009 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? 2009 ___ YES ___ NO

Did you sell and/or purchase a principal residence in 2009 ? ___ 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 2009 ? ___ 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 ? ___ 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

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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 2007, 2008, or 2009? 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 2009? YES NO

Did you sell property or equipment on installment in 2009? 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 2009. 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.).