CONTACT INFORAMTION

Please provide the following information so that we may contact you at the most convenient time and method for you.

Home Phone: ______________________ Best time to call: ____________________

Cell Phone: ______________________ Best time to call: ____________________ Taxpayer or Spouse?

Work Phone: ______________________ Best time to call: ____________________ Taxpayer or Spouse?

Other Phone: ______________________ Best time to call: ____________________ Taxpayer or Spouse?

Do you check your email on a regular basis? ☐ Yes ☐ No If **yes**, may we use this method of communicating with you?
Please complete the email address to use: ____

PERSONAL INFORMATION

YES	NO	
☐	☐	Did your marital status change during 2011? If **yes**, explain… ____
☐	☐	Do you or your spouse plan to retire in 2012?
☐	☐	Were you permanently and totally disabled in 2011? Taxpayer ☐ Spouse ☐
☐	☐	Are you or your spouse legally blind? Taxpayer ☐ Spouse ☐
☐	☐	Enter date of death for taxpayer or spouse, if during 2011 or 2012: Taxpayer ___________ Spouse ___________
☐	☐	Were you or your spouse a member of the U.S. Armed Forces during 2011?

If you were unmarried (or considered unmarried) at the end of the tax year, and you contributed over half the cost of maintaining a household for your child or other dependent, you may be eligible for Head of Household filing status. If you are married, you may be considered unmarried for this purpose if your spouse did not live in your home during the last six months of the tax year. If maintaining the household of a parent, the parent does not necessarily need to live with you to qualify. If you feel this may apply to you, please check here. ☐

DEPENDENT INFORMATION

YES	NO	
☐	☐	Were there any changes in dependents from the prior year? If **yes**, provide details.
☐	☐	Did any dependent child over 19 years of age attend school less than 5 months during the year?
☐	☐	Did you have a child, under the age of 18 or a full time student age 19 - 23, who earned more than $1,900 in investment income? If **yes**, do you want to include your child's income on your return?
☐	☐	Do you have any dependents who must file? If **yes**, do you want us to prepare the return(s)?
☐	☐	Are any of your dependents **not** U.S. citizens or residents?
☐	☐	Did you provide over half the support for any other person during 2011?
☐	☐	Did you incur adoption expenses during 2011?
☐	☐	Did you pay child care costs for a dependent child under age 13, or costs of caring for a handicapped individual, so you could work, attend school or look for a job? If **yes**, provide the amounts paid for each dependent and the names, addresses and taxpayer identification numbers of the care providers.
☐	☐	Did you claim any amount through an employer's dependent care reimbursement plan?
☐	☐	Are you entitled to a dependency exemption due to a divorce decree?

ITEMS RELATED TO INCOME/LOSSES

YES	NO	
☐	☐	Did you receive any disability payments in 2011?
☐	☐	Did you receive any tips not reported to your employer?
☐	☐	Did you receive alimony in 2011? Amount $ ________________________
☐	☐	Did you receive unemployment compensation? If **yes**, provide Form 1099-G.
☐	☐	Did you have gambling winnings? If **yes**, attach Form W-2 G.
☐	☐	Do you expect a substantial change in income or deductions next year?

ITEMS RELATED TO INCOME/LOSSES (continued)

☐	☐	Did you sell stock, securities, real estate or other property? If yes, provide all Forms 1099-B. Also provide: (1) a description of the property, (2) date of purchase, (3) date of sale, (4) purchase price, (5) selling price, (6) expenses of sale, (7) improvements or other cost/basis additions, and (8) closing statements for purchase and/or sale.
☐	☐	Do you own any securities or hold any bad debts that became worthless during the year? Provide details.
☐	☐	Did you purchase or sell or abandon a home or refinance your home mortgage during 2011? Provide closing papers for all transactions. ○ New Purchase ○ Sold Home ○ Refinanced ○ Abandoned
☐	☐	Are you planning to purchase a home soon?
☐	☐	Did you incur any debt forgiveness in 2011? Provide details and attach any Forms 1099-A or 1099-C.
☐	☐	Did you incur any casualty or theft losses during 2011?

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

YES	NO	
☐	☐	Did you have foreign income or pay any foreign taxes in 2011?
☐	☐	At any time during 2011, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country? If **yes**, explain ______________________________

PRIOR YEAR TAX RETURNS

YES	NO	
☐	☐	Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? If **yes**, enclose agent's report or notice of change.
☐	☐	Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?

IRA, PENSION AND EDUCATION SAVINGS PLANS

YES	NO	
☐	☐	Did you receive payments from a pension or profit-sharing plan?
☐	☐	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?
☐	☐	Did you convert all or part of a regular IRA or a qualified plan into a Roth IRA?
☐	☐	Did you contribute to a Coverdell Education Savings Account?
☐	☐	Did you contribute to an IRA, Roth IRA or self-employed retirement plan for 2011, other than through your place of employment? Complete for all that applies: Self / Spouse Traditional IRA $ ______________ $ ______________ Roth IRA $______________ $______________ SEP $______________ $______________
☐	☐	Are you interested in making additional contributions to a retirement plan?
☐	☐	If either you or your spouse attained age 70 ½ during the year, are you taking required minimum retirement plan distributions?

EDUCATION

YES	NO	
☐	☐	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?
☐	☐	Did you contribute to Ohio College Savings Account Sec 529 plan? Amount $ ______________

HEALTH AND LIFE INSURANCE		
YES	NO	
☐	☐	Did you or your spouse have self-employed health insurance premiums?
☐	☐	If you or your spouse are self-employed, are either you or your spouse eligible to participate in an employee's health insurance plan at another job?
☐	☐	Did you pay health insurance premiums (other than self-employed)? Amount $ ________________ ○ Through Employer: Deducted before tax or after tax? (Circle One)
☐	☐	Did you pay long-term care premiums? Taxpayer: $ _______________ Spouse: $ __________________
☐	☐	Do you have a Health Savings Account? (This is not the same as a Medical Flex Plan.) If yes, attach Form 1099-SA Amount deducted from pay (**does not** include employer contributions) __________________ Amount contributed individually, **not** through payroll deduction _____________________
☐	☐	Did you or your spouse elect continuation of COBRA coverage after your employment was involuntarily terminated?

MISCELLANEOUS		
YES	NO	
☐	☐	Did you install in 2011 any energy efficient items to your home? You may be eligible for the Residential Energy Credit. Provide your invoices as well as the Qualification Certificate from the manufacturer.
☐	☐	Did you purchase a hybrid or electric vehicle in 2011? If **yes**, provide purchase papers.
☐	☐	Did you purchase a motor vehicle or boat during 2011? If **yes**, provide sales receipt or amount of sales tax paid.
☐	☐	Are you making payments on a recreational vehicle or boat that has basic living accommodations? If **yes**, provide interest paid.
☐	☐	Did you donate a vehicle in 2011? If **yes**, attach Form 1098C
☐	☐	Did you make any charitable contributions? You must have copies of checks or receipts in order to claim. Any single donation of $250 or greater must also have a letter from the charitable organization that includes each donation listed separately.
☐	☐	Did you or your spouse make gifts of over $13,000 to an individual or contribute to a prepaid tuition plan?
☐	☐	Did you make gifts to a trust?
☐	☐	Did you make a loan at an interest rate below market rate?
☐	☐	Did you start paying mortgage insurance premiums in 2011? If **yes**, please attach details.
☐	☐	Did you pay alimony during 2011? Name ____________________________________ Social Security Number ____________________ Amount $ ________________
☐	☐	If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? If **yes**, please attach details.
☐	☐	Did you have any out-of-pocket expenses associated with your job? Provide amounts and details.
☐	☐	Did you move at least 50 miles because of job change? Provide details for a possible moving expense deduction.
☐	☐	Did you acquire any interests in partnerships, LLCs, S corporations, estates or trusts this year?

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND		
YES	NO	
☐	☐	Do you want any overpayment of taxes applied to next year's estimated taxes?
☐	☐	Do you want any remaining federal or state refund deposited directly to your bank account? **If yes, enclose a voided check.**

☐ Check box if you want your tax documents from 2004. (OTHERWISE THESE DOCUMENTS WILL BE SHREDDED.)

☐ Check box if you would like an upfront price quote for the preparation of your tax return.

☐ ☐ Did you pay any estimates during 2011? If **yes**, complete the following:

	Amount	Date Paid
Federal	____________	____________
	____________	____________
	____________	____________
	____________	____________
State	____________	____________
	____________	____________
	____________	____________
	____________	____________
Local	____________	____________
	____________	____________
	____________	____________
	____________	____________
School District	____________	____________
	____________	____________
	____________	____________
	____________	____________