

Completion of this form is **optional**. However by completing it, you will expedite the completion of your tax return, help avoid missing important deductions and help keep tax preparation fees down.

Your First Name  
and Initial

Spouse's First Name  
and Initial (If applicable)

Last Name

Please answer the following questions by checking Yes or No. **If you check No to any question, please enter the revised information as applicable** in the space provided.

1. Is your address the same as entered on last year's tax return? Yes  No

New Street

New City

New Zip

2. Do you have the same dependents as listed on last year's tax return? Yes  No

Add new ones \_\_\_\_\_

Please Delete \_\_\_\_\_

3. Did you have a change in marital status as compared to last year's return? Yes  No

4. Do you have the same occupation as entered on last year's return? Yes  No  Spouse Yes  No

Your New Occupation \_\_\_\_\_

Spouse's New Occupation \_\_\_\_\_

5. Were either you or your spouse 65 or older on December 31 of the year just ended? Yes  No

6. Do you wish \$1 to go to the presidential election fund? Yes  No  Spouse Yes  No

7. Did you pay any estimated tax payments? Yes  No  If yes, please enter amounts on back.

8. Were you claimed as a dependent on another taxpayer's return? Yes  No

**PLEASE CHECK YES IF YOU OR YOUR SPOUSE RECEIVED ANY INCOME FROM THE FOLLOWING SOURCES:**

|   |                              |                                    |                              |
|---|------------------------------|------------------------------------|------------------------------|
| Wage or Salary  | YES <input type="checkbox"/> | Pension Income                     | YES <input type="checkbox"/> |
| Interest Received   | YES <input type="checkbox"/> | Pension Rollover                   | YES <input type="checkbox"/> |
| Tax-Exempt Interest   | YES <input type="checkbox"/> | Partnership or Royalty Income      | YES <input type="checkbox"/> |
| Dividend Income   | YES <input type="checkbox"/> | Income from Rental Property        | YES <input type="checkbox"/> |
| State Tax Refund  | YES <input type="checkbox"/> | Estate or Trust Income             | YES <input type="checkbox"/> |
| Did You Itemize Your Deductions<br>On Last Year's Tax Return? | YES <input type="checkbox"/> | Farm Income                        | YES <input type="checkbox"/> |
| Alimony Received  | YES <input type="checkbox"/> | Unemployment Income                | YES <input type="checkbox"/> |
| Business Income & Deductions                                  | YES <input type="checkbox"/> | Social Security Benefits           | YES <input type="checkbox"/> |
| Sale of Stocks, Bonds or Other Assets                         | YES <input type="checkbox"/> | Gambling Winnings                  | YES <input type="checkbox"/> |
| *Sale of Real Estate  | YES <input type="checkbox"/> | Gifts, Prizes, Awards or Bonuses   | YES <input type="checkbox"/> |
| *Sale of Principal Residence                                  | YES <input type="checkbox"/> | Independent Contractor 1099 Income | YES <input type="checkbox"/> |
|   |                              | Income From Any Other Source       | YES <input type="checkbox"/> |

*If you checked YES to any of the above income items, please bring W-2(s), Bank Statement or other available records that indicate amounts received.*

\*If you bought or sold rental real estate or your principal residence, please bring the escrow closing or settlement statement.

Please complete back of this page so we can determine if you qualify to itemize your deductions.