

2011 1040 Organizer Questions

Yes	No	
___	___	Did your marital status or address change during the year?
___	___	Could you be claimed as a dependent on another person's tax return?
___	___	Were there any changes in your dependents?
___	___	Did you buy or sell any stocks, bonds or other investment property?
___	___	Did you purchase, sell or refinance your principal home or second home, or did you take a home equity loan?
___	___	Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal or fuel cell property or improvements, or an alternative fuel car?
___	___	Did you receive a distribution from or make a direct contribution to a retirement plan (401 (k), IRA, etc.) other than through your payroll?
___	___	Did you transfer or rollover any amount from one retirement plan to another?
___	___	Did you, your spouse, or a dependent incur any tuition expenses or student loan interest payments?
___	___	Did you incur a loss because of damaged or stolen property?
___	___	Did you receive any dependent care benefits through your W-2?
___	___	Did you pay any Private Mortgage Insurance (PMI) through your mortgage?
___	___	Did you make any contributions to the State Tuition Savings program (CHET)?
___	___	Do you or your spouse have Military Retirement Pensions?
___	___	Did you pay large medical bills not covered by insurance?
___	___	May the IRS discuss your tax return with your preparer?
___	___	Did you have any debts cancelled or forgiven?
___	___	Do you have a Medical Savings Account (MSA)?
___	___	Did you cash any Series EE US Savings Bonds issued after 1989 and use the money to pay qualified higher education expenses for yourself, your spouse or your dependents or receive a distribution from an Education Savings Account or Qualified Tuition Program?
___	___	Did you work out of town for part of the year or have significant unreimbursed work expenses?
___	___	Do you want direct deposit? Is your direct deposit account the same as last year?
___	___	If we gave you a schedule of estimated tax payments to make last year, did you make them at the amounts and dates we suggested?
___	___	Do you have foreign investments or accounts?