

LA Tax Service LLP Questionnaire 2009

Yes No

- Did your marital status change during the year?
- Are you a Registered Domestic Partner?
- Could you, or your spouse, be claimed as a dependent on another person's tax return?
- Were there any changes in dependents for you, or your spouse? (If so, please bring all social security numbers.)
- Did you, or your spouse, receive unreported tip income of \$20 or more in any month?
- Did you, or your spouse, receive any disability or unemployment income?
- Did you, or your spouse, receive any settlements: due to injury or property?
- Did you, or your spouse, buy or sell any stocks, bonds or other investment property? (If so, please bring any gain/loss information.)
- Did you, or your spouse, purchase, sell or refinance your principal home or second home, or did you take a home equity loan? (If so, please bring settlement closing documents.)
- Did you, or your spouse, purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements?
- Did you, or your spouse, participate in the Cash for Clunkers program?
- Did you, or your spouse, purchase a new motor vehicle? (If so, please bring in the long sheet provided to you by the dealer for the sales tax and DMV fee information.)
- Did you, or your spouse, purchase a new alternative motor vehicle (hybrid, advanced learn burn, fuel cell, plug-in)?

Yes No

- Did you, or your spouse, receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc)?
- Did you, or your spouse, transfer or rollover any amounts from one retirement plan to another retirement plan?
- Did you, or your spouse, convert part or all of your traditional, SEP or SIMPLE IRA to a Roth IRA?
- Do you want to discuss conversion opportunity? (If so, please bring balances of all IRAs to our meeting, separated by tax payer.)
- Did you, or your spouse, have any losses from your IRA? (If so, let's discuss strategy.)
- Do you, or your spouse, have a Health Savings Account (HSA)? (If so, would you like to discuss funding opportunities with IRA money?)
- Did you, or your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or a vocational school?
- Did you incur a loss because of damaged or stolen property?
- Did you use your car on the job (other than to and from work)? (If so, please bring mileage log.)
- May the IRS discuss your, and/or your spouses, tax return(s) with your tax preparer?
- Was your, or your spouse's, home rented out or used for business?
- Were you, or your spouse, notified or audited by either the Internal Revenue Service or the State taxing agency?
- Did you, or your spouse, receive a \$250 economic recovery payment in 2009 that was made to social security recipients, railroad retirement recipients and certain veterans?
- Did you, or your spouse, receive a pension or annuity in 2009 for services performed as an employee of the U.S., state or local government from work not covered by social security?

Yes No

- Did you, or your spouse, elect to receive COBRA continuation health coverage (35% of premium) between February 17, 2009 and December 31, 2009 as a result of an involuntary termination?
- Do you, or your spouse, have a foreign bank account over \$10,000 USD? (If so, please provide the bank name, address, account number and balance.)
- Did you, or your spouse, receive any foreign sourced funds from foreign pensions, companies, trusts or individuals?
- Did you, or your spouse, lose a home in bankruptcy, short sale or foreclosure?
- Do you, or your spouse, have any bad debt? (Valid loan not repaid.)
- Did you, or your spouse, work as a self-employed business person? (If so, did you file for city business tax? Have you sent in your 1099's?)
- Have you, or your spouse, made any gifts in excess of \$13,000?
- Did you, or your spouse, purchase any items from an out-of-state retailer (or a foreign retailer) and not pay California use tax? (i.e. amazon.com, books, clothes, furniture, etc)
- Do you, or your spouse, have a living trust?