

LA Tax Service, LLP

Questionnaire 2010

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, unemployment income or Social Security 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, 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 IRA, SEP and/or SIMPLE IRA to a Roth IRA?

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?

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?