

Miscellaneous Information

Name: _____

SSN: _____

Yes	No	
		Did any births, adoptions, marriages, divorces, or deaths occur in your family during the year?
		Can you or your spouse be claimed as a dependent by someone else?
		Have you received all W-2's from all employers? How many? _____ Please attach.
		Have you received any disability income during the year? \$ _____
		Did you or your spouse receive any social security benefits during the year? Please attach Form(s) SSA-1099.
		Did you have a change in residence or job location during the year?
		Did you use your vehicle on the job other than for commuting to work?
		Did you have an employer-provided vehicle which you drove home or used personally? If so, enter the lease value \$ _____
		Did you work out of town at any time during the year?
		Did you start a new business or purchase any rental property during 2006?
		Did you purchase, sell, or refinance your principal home or your second home or make a home equity loan during the year? If yes, please bring escrow papers and other pertinent information.
		Have you purchased any business assets (furniture, equipment, etc.) or converted any assets to business use? If yes, please list on attached sheet. Also, please bring escrow papers for purchases of real estate.
		Did you dispose of any business assets (including real estate)? If yes, list on attached sheet.
		Did you receive any notices from the IRS or the state? If yes, please attach.
		Did you have an interest in or signature over a bank or brokerage account in a foreign country, or were you a grantor of or transferor to a foreign trust?
		Did you receive any type of prize or award during 2006?
		Did you engage in any bartering transactions in 2006?
		Did you surrender any U.S. Savings Bonds during 2006?
		Does anyone owe you money which has become uncollectible?
		Did you incur a loss due to damaged or stolen property?
		Did you or your spouse "roll over" a profit-sharing or retirement plan distribution into another plan?
		Did you make any gifts over \$12,000 to any one person in 2006?
		Did you purchase any gasoline, diesel, or special fuels for non-highway business uses?
		Did you receive any income not shown in this organizer? If so, please list.
		If you owned rental property, what percentage of time did you spend managing your rentals? _____
		Did you have any household employees? (babysitter, housekeeper, nanny, etc.)
		Do you or your spouse have any IRA accounts?
		Did you recharacterize any IRAs this year?
		Did you have child care expenses?

Comments: _____

E-mail address: _____