

Please answer the following questions to determine maximum deductions and credits:

- | | Yes | No | | Yes | No |
|--|-----------------------|-----------------------|---|-----------------------|-----------------------|
| 1 Were you or your spouse permanently and totally disabled? | <input type="radio"/> | <input type="radio"/> | 2 Were there any births, deaths, marriages, divorces or adoptions in your family? | <input type="radio"/> | <input type="radio"/> |
| 3 Did you receive any disability payments? | <input type="radio"/> | <input type="radio"/> | 4 Did you receive any Veterans Affairs benefits? | <input type="radio"/> | <input type="radio"/> |
| 5 Are you self-employed or do you receive hobby income? | <input type="radio"/> | <input type="radio"/> | 6 Did you receive income from raising animals or crops? | <input type="radio"/> | <input type="radio"/> |
| 7 Did you receive rent from real estate or other property? | <input type="radio"/> | <input type="radio"/> | 8 Do you have a foreign bank account, trust, or business? | <input type="radio"/> | <input type="radio"/> |
| 9 Do you provide a home for or help support anyone not listed above as a dependent? | <input type="radio"/> | <input type="radio"/> | 10 Did you receive any correspondence from the IRS or State Department of Taxation? | <input type="radio"/> | <input type="radio"/> |
| 11 Did you receive income from gravel, timber, oil, gas, minerals, copyrights, or patents? | <input type="radio"/> | <input type="radio"/> | 12 Did you have any debts cancelled, forgiven, or refinanced? | <input type="radio"/> | <input type="radio"/> |
| 13 Did you give a gift of more than \$13,000 to one or more people? | <input type="radio"/> | <input type="radio"/> | 14 Did you go through bankruptcy proceedings? | <input type="radio"/> | <input type="radio"/> |
| 15 If over age 65 or 100% disabled, did you pay rent for your principal residence? | <input type="radio"/> | <input type="radio"/> | 16 Did you pay interest on a student loan for yourself, spouse, or your dependent? | <input type="radio"/> | <input type="radio"/> |
| 17 Did you pay expenses for yourself, spouse, or your dependent to attend college? (Attach Form 1098-T) | <input type="radio"/> | <input type="radio"/> | 18 Did you have any children under the age of 19 or 19 to 23 year old student with unearned income of more than \$1900? | <input type="radio"/> | <input type="radio"/> |
| 19 Do you have dependents who must file? | <input type="radio"/> | <input type="radio"/> | 20 Did you purchase a new "hybrid", alternative technology vehicle or electric vehicle? | <input type="radio"/> | <input type="radio"/> |
| 21 Did you receive tip income not reported to your employer? | <input type="radio"/> | <input type="radio"/> | 22 Did you buy or sell any stocks or bonds? | <input type="radio"/> | <input type="radio"/> |
| 23 Did you incur any casualty or theft losses? | <input type="radio"/> | <input type="radio"/> | 24 Did you incur any job-related moving expenses? | <input type="radio"/> | <input type="radio"/> |
| 25 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? | <input type="radio"/> | <input type="radio"/> | 26 Did you install any energy property to your residence such as solar water heaters, generators or fuel cells or energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters? | <input type="radio"/> | <input type="radio"/> |
| 27 Did you pay any individual for domestic services? | <input type="radio"/> | <input type="radio"/> | 28 Did you donate a vehicle? | <input type="radio"/> | <input type="radio"/> |
| 29 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property? Did you receive home-buyer credit on this home? | <input type="radio"/> | <input type="radio"/> | 30 If you paid any alimony, enter recipient's SSN: _____ and amount paid \$ _____ | <input type="radio"/> | <input type="radio"/> |
| 31 Did you receive any distributions from a Health Savings Account or Archer MSA? | <input type="radio"/> | <input type="radio"/> | 32 Did you receive any income not included in this Tax Organizer? | <input type="radio"/> | <input type="radio"/> |
| 33 Did you receive a first-time homebuyer credit on a home purchased in 2008? (this must be repaid starting w/ 2010) | | | <input type="radio"/> | <input type="radio"/> | |

W-2s _____ # 1099INT _____ # 1099DIV _____ # 1099R _____ # SSA1099R _____ # RRB1099R _____

W-2G _____ # 1099G _____ # 1098 _____ # 1098T _____ # 1098E _____ # Sch K-1 _____ # _____