

Questions

Please check the appropriate box and include all necessary details.

	Yes	No
Personal Information		
Did your marital status change during the year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
Did your address change from last year?	<input type="checkbox"/>	<input type="checkbox"/>
Can you be claimed as a dependent by another taxpayer?	<input type="checkbox"/>	<input type="checkbox"/>
Were there any changes in dependants from prior years?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
Did you or any dependants attend COLLEGE?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, WHO? _____ What GRADE? _____		
TUITION COST in 2003: _____		
Income Information		
Did you have any income other than W-2 or business related?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, explain: _____		
Did you receive any income from property sold prior to this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any lump-sum payments from pension, profit sharing or 401(k)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Keogh, SIMPLE, or SEP account?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, was it an early withdrawal?	<input type="checkbox"/>	<input type="checkbox"/>
If it was an early withdrawal, what was it used for? _____		
Banking and Stock Information		
Did you close any bank accounts this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please list here or designate on the organizer: _____		
Did any of your banks change names?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please list here or designate on the organizer: _____		
Did you sell any stock or mutual funds this year or have you received a 1099-B?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, have you included the PURCHASE PRICE & DATE or GAIN/LOSS ?	<input type="checkbox"/>	<input type="checkbox"/>
Business Information		
Did you start a new business or purchase rental property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire a new or additional interest in a partnership or S corporation ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell an existing business, rental, or other property this year?	<input type="checkbox"/>	<input type="checkbox"/>
Itemized Deduction Information		
Did you take out a home equity loan or refinance this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did you include the settlement papers?	<input type="checkbox"/>	<input type="checkbox"/>
Did you include mortgage interest and real estate statements?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any work related expenses ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you include a list of charitable contributions ?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any educational expenses during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any expenses related to seeking a new job during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any major purchases during the year (cars, boats, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Miscellaneous Information		
Are you covered by a pension or retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur moving costs because of a job change?	<input type="checkbox"/>	<input type="checkbox"/>
Did you put any money into a regular (not Roth) IRA? Amount _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you make all of your ESTIAMTED payments if we requested you to do so?	<input type="checkbox"/>	<input type="checkbox"/>
If you lived in a RITA or CCA City: List 2003 amount PAID _____ or was REFUNDED _____		