

## Miscellaneous Questions:

**If any of the following items pertain to you or your spouse for 2010, please check the appropriate line and provide additional information if necessary. *New tax laws bolded.***

Yes

No

- Did your address change during the year? Please make corrections on information sheet provided.
- Did your marital status change during the year?
- Could you be claimed as a dependent on another person's tax return?
- Were there any changes in dependents? Please add to information sheet provided.
- Did you receive unreported tip income of \$20 or more in any month?
- Did you receive any disability income?
- Did you buy or sell any stocks, bonds or other investment property?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
- 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, provide the information on the reverse side?
- Do you want to electronically file your tax return?
- May the IRS discuss your tax return with your preparer?
- Was your home used for business? If so, provide mortgage or rent, real estate tax, insurance and utilities?
- Were you notified or audited by either the IRS or the State taxing agency?
- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc)?
- Did you transfer or rollover any amount from one retirement plan to another?
- Did you purchase a new alternative motor vehicle (hybrid, advanced lean burn, fuel cell, Plug in)?
- Did you purchase any of the following energy efficient items for your home? Example: Windows, Doors, Insulation,, Furnace, Hot Water Heater(Mfg energy efficient certificate required, check websites)**
- Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements? Attach receipts

### Estimated Payments

|                              |                |                 |
|------------------------------|----------------|-----------------|
| April 15 <sup>th</sup> ,2010 | Amt Paid _____ | Date Paid _____ |
| June 15 <sup>th</sup> , 2010 | Amt Paid _____ | Date Paid _____ |
| Sept 15 <sup>th</sup> ,2010  | Amt Paid _____ | Date Paid _____ |
| Jan. 15 <sup>th</sup> ,2011  | Amt Paid _____ | Date Paid _____ |

**Please turn over**

*Be sure to visit our website at [www.sandraclaytorcpa.com](http://www.sandraclaytorcpa.com)*