Info due by March 26th to ensure completion April 15th

WORTHING & GOING, P.A.
CPAs and Business Advisors
Vision Beyond the Numbers

PLEASE NOTE: ALL ELIGIBLE TAX RETURNS WILL BE E-FILED

2009 Individual Tax Return Client Questions

To update our files, please provide the following information:

	Name	SSN	D.O.B
Taxpayer	______________________________	___________________	_______________
Spouse	______________________________	___________________	_______________
Dependents	______________________________	___________________	_______________
	______________________________	___________________	_______________
	______________________________	___________________	_______________

Even returning clients need to complete this section

Client Contact Information (please check mark preferred contact number)

Home ____________________________ ☐ Taxpayer Work ____________________________ ☐

Taxpayer Fax ____________________________ ☐ Taxpayer Cell ____________________________ ☐

Confidential E-mail ____

Bank Information for Direct Deposit/Electronic Funds Withdrawal:

Name of Financial Institution____

Financial Institution's Routing Transit Number ____

Your Account Number ____

Type of Account (1 = Savings / 2 = Checking / 3 = IRA) ____________

Please provide a copy of a voided check to verify information.

Staple Voided Check Here

Please check the appropriate box and include all necessary details.	**Yes**	**No**
Personal Information		
Did your marital status change during the year?	☐	☐
If yes, explain: ____		
Did your address change from last year?	☐	☐
Can you be claimed as a dependent by another taxpayer?	☐	☐
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	☐	☐
Dependent Information		
Were there any changes in dependents from the prior year?	☐	☐
If yes, explain: ____		
Do you have any children under age 19 with unearned income in excess of $1900?	☐	☐
Did you pay for child care while working or looking for work?	☐	☐

Please check the appropriate box and include all necessary details.	Yes	No
Did you start a new business or purchase rental property during the year?	☐	☐
Did you acquire a new or additional interest in a partnership or S corporation?	☐	☐
Did you sell, exchange, foreclose or purchase any real estate during the year?	☐	☐
Did you acquire or dispose of any stock during the year?	☐	☐
Did you take out a home equity loan this year?	☐	☐
Did you refinance a principal residence or second home this year?	☐	☐
Did you sell an existing business, rental, or other property this year?	☐	☐
Did you incur any non-business bad debts?	☐	☐
Did you purchase a new hybrid, alternative motor, or electric energy efficient vehicle?	☐	☐
Did you pay any student loan interest this year?	☐	☐
Income Information		
Did you have any foreign income or pay any foreign taxes during the year?	☐	☐
Did you receive any income from property sold prior to this year?	☐	☐
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	☐	☐
Did you make any withdrawals from or contributions to an IRA, Keogh, SIMPLE, or SEP account?	☐	☐
Did you make any withdrawals from or contributions to a retirement plan?	☐	☐
Did you make any withdrawals from an education savings/529 Plan account?	☐	☐
Did you receive any disability income during the year?	☐	☐
Did any of your life insurance policies mature, or did you surrender any policies?	☐	☐
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	☐	☐
Itemized Deduction Information		
Did you incur a casualty or theft loss during the year?	☐	☐
Do you have evidence to substantiate all charitable contributions? (The IRS now requires that you have either a receipt or cancelled check to verify all charitable contributions.)	☐	☐
Did you make any non-cash charitable contributions (clothes, furniture, vehicles, etc.)?	☐	☐
Did you have an expense account or allowance during the year?	☐	☐
Did you use your car on the job, for other than commuting?	☐	☐
Did you work out of town for part of the year?	☐	☐
Did you have any educational expenses or make any student loan interest payments during the year?	☐	☐
Did you have any expenses related to seeking a new job during the year?	☐	☐
Did you make any major purchases during the year (cars, boats, etc.)?	☐	☐
Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?	☐	☐
Miscellaneous Information		
Did you make gifts of more than $13,000 to any individual?	☐	☐
Did you engage in any bartering transactions?	☐	☐
Are you covered by a pension or retirement plan?	☐	☐
Did you incur moving costs because of a job change?	☐	☐
Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?	☐	☐
Did you receive correspondence from the State or the Internal Revenue Service? If yes, explain: ____	☐	☐
Do you want to designate $3 to the Presidential Election Campaign Fund? Checking yes will not change your tax or reduce your refund.	☐	☐
State of Maine – Use Tax		
Did you make any out-of-state purchases (by telephone, internet, mail, in-person) that the seller did not collect sales or use tax?)	☐	☐
If yes, please provide the amount of out-of-state purchases.$_________	☐	☐
Or, we can calculate this amount using the State of Maine table.		