

CLIENT TAX QUESTIONNAIRE
BEIR ACCOUNTING & INCOME TAX - INDIVIDUAL INCOME TAXES – YEAR 2007

Personal Information:

CHECK IF YES

- Did you marital status change during this year? _____
- Did you have any new dependents this year? _____
- Did you have a change in address or job during 2007? _____
- Did you incur any MOVING EXPENSES because of a change in the location of your job? _____
- Did you move from another state during the year? _____
- Can you or your spouse be claimed as a dependent by another taxpayer? _____

Dependents:

- Were there any changes in dependents from the prior year? _____
- Did you pay for CHILDCARE EXPENSES while you worked or looked for work for a child under 13? _____
- Any children under 18 with investment income (dividends, interest, capital gains) more than \$850.00? _____
- Did you pay tuition at a private school for a special needs child? _____
- Did you ADOPT a child or begin adoption proceedings during 2007? _____

Purchases, Sales and Debt:

- Did you start a new business, buy or sell shares of a partnership or S corporation? _____
- Did you sell, exchange, or purchase any real estate (residence or rental property)? _____
- Did you buy, sell, or exercise any STOCK OPTIONS? _____
- Did you own rental property, receive rental income, own a business, or receive a Schedule K-1 at year end? _____
- Did you Buy or Sell any shares of Stock or Mutual funds? _____
- Did you pay any STUDENT LOAN INTEREST in 2007? _____
- Did pay any TUITION EXPENSES for anyone in the family? _____
- Did you purchase any ENERGY EFFICIENT IMPROVEMENTS TO YOUR HOME? _____
- Did you have TEACHER EXPENSES for supplies for kindergarten thru 12? _____
- Do you have any STOCK CARRYOVERS or other carryovers? _____
- Did you pay any ESTIMATED TAXES for federal or state? _____

Itemized Deductions:

- Did you pay any health insurance exp, doctors, hospitals, surgery, prescriptions or other medical? _____
- Did you pay any LONG TERM CARE premiums? _____
- Did you pay any REAL ESTATE TAXES during the year? _____
- Did you pay any CAR TAXES during the year? _____
- Did you pay any MORTGAGE INTEREST or Investment interest during the year for 1st or 2nd home or boat? _____
- Did you REFINANCE or take out any Home Equity loan? _____
- Did you pay any DONATIONS or contributions of cash or property during the year? _____
- Did you incur any Casualty or theft losses during the year? _____

Employee Job Expenses:

- Did you use your vehicle on the job other than commuting to work? _____
- Did you work out of town anytime? _____
- Did you Employee business expenses-tools-fees-uniforms-equipment-dues? _____
- Did you have any Job search expenses? _____
- Did you have any required continuing education? _____

Income:

- Did you have any INTEREST income, muni interest or dividend income? _____
- Did you have receive any STATE TAX refund? _____
- Did you receive any UNEMPLOYMENT compensation income? _____
- Did you have any PENSION or SOCIAL SECURITY income? _____
- Did you receive any type of prize or award income? _____
- Did you receive or pay any ALIMONY? _____
- Did you receive any other income (commissions, fees, tips, gambling, prizes, awards, jury duty)? _____
- Did you sell any SHARES OF STOCK or mutual funds? _____
- Did you receive any RENTAL PROPERTY income? _____
- Did you receive any SEVERANCE PAY from any job? _____

Retirement Accounts

- Did you or your spouse Contribute to an IRA/ Roth IRA/ 401K or convert an existing IRA into a Roth IRA? _____
- Did you or your spouse rollover any distributions from a retirement account? _____
- Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse or children? Or to acquire a residence? Or other reason? _____