Questions

The following questions pertain to the 2014 tax year. For any question answered Yes, include supporting detail or documents.

Personal Information:	**Yes**	**No**
Did your marital status change?		
Are you legally married?		
If Yes, do you and your spouse want to file separate returns?		
If Yes, will you file a joint federal return and be required to file single state returns?		
If No, are you in a domestic partnership, civil union, or other state-defined relationship?		
Can you or your spouse be claimed as a dependent by another taxpayer?		
Did you or your spouse either serve in the military or on active duty?		
If you or your spouse have been a victim of identity theft, have you contacted the IRS?		

If Yes, furnish the 6-digit identity protection PIN issued to you by the IRS. ________ Taxpayer ________ Spouse

Dependents:

	Yes	No
Were there any changes in dependents from the prior year? Note: Include non-child dependents for whom you provided more than half the support.		

If Yes, please provide their Name, Date of Birth, & Social Security Number.

	Yes	No
Did you or your spouse pay for child care while you or your spouse worked or looked for work?		
Do you have any children under age 18 with **UNEARNED** income more than $1,000?		
Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $1,000?		
Did you adopt a child or begin adoption proceedings?		
Are any of your dependents non-U.S. citizens or non-U.S. residents?		

Healthcare:

	Yes	No
Did you have healthcare coverage (health insurance) for you, your spouse, and any dependents?		

If Yes, include all Forms 1095-A, 1095-B, or 1095-C.

	Yes	No
Did you or your spouse have any transactions pertaining to a health savings account (HSA)?		

If you received a distribution from an HSA, include all Forms 1099-SA.

	Yes	No
Were all distributions from your HSA for unreimbursed qualified medical expenses?		
Did you or your spouse have any transactions pertaining to a medical savings account (MSA)?		

If you received a distribution from an MSA, include all Forms 1099-SA.

	Yes	No
Did you or your spouse receive any distributions from long-term care insurance contracts?		

If Yes, please provide the documentation received from the care provider.

	Yes	No

If you or your spouse are self-employed, are you eligible to be covered under an employer's health plan at another job? _____ _____

If Yes, how many months were you covered? ________

If you or your spouse are self-employed, are you eligible to be covered under an employer's long-term care plan at another job?

If Yes, how many months were you covered? ________

Did you or your spouse lose your job because of foreign competition and pay for your own health insurance? _____ _____

Education:

Did you or your spouse pay any student loan interest? _____

If Yes, please send us Form 1098-E.

Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?

Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529) plan?

If Yes, include all Forms 1099-Q.

Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? _____

Deductions and Credits:

Did you or your spouse contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?

If Yes, provide the appraisal of property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of $10,000 or less.

Did you or your spouse incur any casualty or theft losses? _____

If Yes, please describe.

Did you or your spouse make any large purchases, such as motor vehicles and boats? _____

If yes, please provide the amount of sales tax paid on the purchase. __________________

Did you or your spouse incur any casualty or loss attributable to a federally declared disaster?

Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle?

Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?

Did you or your spouse install any energy efficiency improvement or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditions, or water heaters? _____ _____

Investments:

Did you or your spouse have any debts canceled, forgiven or refinanced?

If Yes, please describe.

	Yes	No
Did you or your spouse start or purchase a business, rental property, farm, or acquire any new interest in any partnership or S corporation?		
Did you or your spouse sell an existing business, rental property, farm, or any existing interest in a partnership or S corporation?		
Did you or your spouse sell, exchange, or purchase any real estate?	_____	
If Yes, include closing statements.		
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?		
Did you or your spouse engage in any put or call transactions?		
Did you or your spouse close any open short sales?		
Did you or your spouse sell any securities not reported on Form 1099-B?	_____	_____

Retirement or Severance:

Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?	_____	_____
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?	_____	_____
If you or your spouse are over age 70 ½ and have money in an IRA or other retirement account, did you take your required minimum distribution?		
Did you or your spouse retire or change jobs?	_____	_____

Personal Residence:

Did your address change?	_____	
If Yes, provide the new address.		
If Yes, did you move to a different home because of a change in the location of your job?	_____	_____
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?		
Did you or your spouse withdraw any amounts from your IRA or Roth IRA to acquire a principal residence?		
Are your total mortgages on your first and/or second residence greater than $1,000,000?	_____	_____

If Yes, provide the principal balance and interest rate at the beginning and end of the year.

Beginning Balance ________________ Beginning Interest Rate _________

Ending Balance ________________ Ending Interest Rate _________

Did you or your spouse take out a home equity loan?		
Did you or your spouse have an outstanding home equity loan at the end of the year?	_____	_____

If Yes, provide the principal balance and interest rate at the beginning and end of the year.

Beginning Balance ________________ Beginning Interest Rate _________

Ending Balance ________________ Ending Interest Rate _________

	Yes	No
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?		

If Yes, please explain.

Did you or your mortgagee receive mortgage assistance payments?

If Yes, include all Forms 1098-MA.

Sale of Your Home:

Did you sell your home?

Did you receive Form 1099-S?

If Yes, include Form 1099-S.

Did you or your spouse own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?

Did you or your spouse ever rent out the property?

Did you or your spouse ever use any portion of the home for business purposes?

Have you or your spouse sold a principal residence within the last two years?

At the time of the sale, the residence was owned by the: ________ Taxpayer ________ Spouse ________ Both

Gifts:

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc., with a total (aggregate) value in excess of $14,000 to any individual?

Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?

Did you or your spouse make any gifts to a trust for any amount?

Did you or your spouse have a life insurance trust?

Did you or your spouse assist with the purchase of any asset (auto, home) for any individual?

Did you or your spouse forgive any indebtedness to any individual, trust or entity?

Foreign Matters:

Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes?

Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature or other authority over a bank account, securities account or other financial account in a foreign country?

Did you or your spouse create or transfer money or property to a foreign trust?

Did you or your spouse own any foreign financial assets?

Miscellaneous:

Did you or your spouse pay in excess of $1,000 in any quarter or $1,900 during the year for domestic services performed in or around your home to individuals who could be considered household employees?

Did you or your spouse receive unreported tip income of $20 or more in any month?

	Yes	No
Have your or your spouse received a punitive damage award for damages other than for physical injuries or illness?		
Did you or your spouse engage in any bartering transactions?		
Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns?		
Did Minnesota change your 2013 tax return to adjust for law changes made after your returns were filed?		
If Yes, please send us the letter you received explaining the change.		
For any trust that you or your spouse created or are trustee, did any beneficiaries, grantors, or trustees die or move?		