FAX TO: (630) 548-7827

* Denotes required information

1040 Tax Questionnaire

Today: / / 2008

How did you find out about us?
- ☐ Internet search engine (Which)
- ☐ Received mailing (When)
- ☐ Saw /Heard Ad (Where) ☐ Other
- ☐ Referred by (Who) (Describe)

❶ Enter above person, location and/or date:

Direct deposit **refund**, if any, to:
See page 2 instructions & review your entry

☐ If Savings Account — Routing # — Account #

☐ Requesting a quote (Supply last year's return and note any changes)

☐ I do NOT want to E-file

Please Neatly Print	Taxpayer	Spouse (if Married)
*First Name & Initial		
*Last Name		If different Last Name desired
*Occupation		
*Social Security #	or enter TIN# (If applicable) ___ - __ - ____	or enter TIN# (If applicable) ___ - __ - ____
*Date of Birth	☐ Blind ☐ Disabled Age @12/31 __ / __ / ____	☐ Blind ☐ Disabled Age @12/31 __ / __ / ____
*Home Phone	(___) ___ - ____	Fax at Home (___) ___ - ____
Cell Phone	(___) ___ - ____	(___) ___ - ____
Work Phone	(___) ___ - ____ x	(___) ___ - ____ x
*E-Mail Address		
A. State of Residency & Date Residency Changed	__ From 1 / 1 to ___ / ___	__ From 1 / 1 to ___ / ___

(Enter the address that is to appear on the tax return)

*Street Address	Apt.#
City	State Zip _____-____

B. If applicable, enter In-Care-of or Trustee Name

Please complete each of the following: (Enter 0 if none) See instructions, E-mail or call with questions?	Taxpayer	Spouse
1. **Furnish a copy of last year's Federal & State return** - or check box if Federal (State) was **not** filed	☐ State ☐	☐ State ☐
2. If either Taxpayer or Spouse died, enter their date of death and furnish a copy of the death certificate		
3. Did you receive any tax **exempt** income (i.e. state bond interest)? Enter amount or furnish statement		
4. If applicable, enter the date you started or disposed of your own business this year (Explain below)		
5. Enter Yes if you sold any stocks, bonds or other investments (Furnish their cost and when acquired)		
6. Enter Yes if you sold your personal residence (Furnish settlement statements for purchase & sale)		
7. If you ☐ purchased ☐ refinanced a home this year, enter date and furnish the settlement statement		
8. Enter any unemployment compensation that was not reported by the statements you have provided		
9. Enter any gambling winnings that were not reported on the statements you have provided		
10. Enter any ☐ tip income ☐ **other income** (explain) that was not reported on the statements you provided		
11. Enter any alimony you ☐ paid ☐ received and to / from whom:________		
12. If of tax benefit, enter the maximum $ amount of an IRA contribution you would make by April 15, 2008		
13. Enter the amount of any Student loan interest you paid (Furnish all 1098-E's you received)		
14. Enter the amount of real estate taxes you or your escrow account paid on your personal residence this year		
15. If you purchased a car this year, enter year & model and amount of sales tax paid:________		
16. Make any home improvements? If so, what did you do and how much did you spend (Explain below)		

Explanation of above or questions you may have (use page 2 or an additional sheet if necessary):

By listing a person below, I am stating that I provided more than half of their total support for 2007.

Dependents *(List even if you're uncertain they qualify)* Name (First, Initial & Last)	Social Security #	Relationship to me	Age at 12/31	Birth Date Mo/Da/Yr	☒ If >$850 from investments Their Gross Income was	Months in my home	If a Student ☒ Student or Child Care Expenses
	___-__-____			__/__/__	$☐		$ ☐
	___-__-____			__/__/__	$☐		$ ☐
	___-__-____			__/__/__	$☐		$ ☐
	___-__-____			__/__/__	$☐		$ ☐
	___-__-____			__/__/__	$☐		$ ☐
	___-__-____			__/__/__	$☐		$ ☐

Please furnish all government reporting statements you have received along with this completed questionnaire. Thank you!

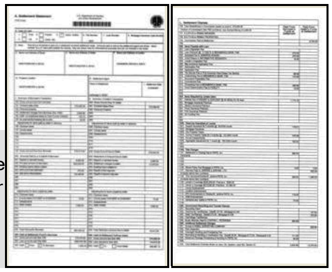
This page ONLY needs to be submitted if you have made entries

Specific Instructions by Question Number:

A. We will prepare a state tax return for the "address" state (the assumed state of residency). If different or you moved this year, enter the date you moved here and the initial state of residency. If you moved, usually 2 state returns will need to be filed.

5. If you sold investments, the sales price and date of sale are normally shown on a 1099-B your broker furnishes. Some brokers will furnish cost and date acquired information if it is known to them. If the investment was not purchased, explain how you acquired it.

6. If the gain on the sale is less than $250,000 ($500,000 if filing jointly) the settlement statement for the **purchase** of your home is probably not required.



A Settlement Statement for closings on real estate is usually 11x14 in size and has 2 columns, one for the buyer and the other for the seller. Expense distributions are on the back side. Please furnish us BOTH sides.

12. If an IRA contribution would reduce your tax burden or increase your refund, enter the maximum amount you would consider making. We will contact you via e-mail with the benefit before the return is finalized. Enter $0 if you definitely will not contribute.

22. Knowing that you possess these assets may generate valuable tax planning strategies for future years.

Instructions for Sending Information:

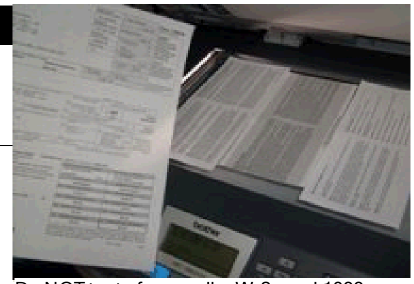
Suggestion: *Make a copy of your 2006 return and check off each amount shown on it as you assemble the documentation required for this year.*

Please fax your info in the following order:

1. This Questionnaire (page 2, if necessary)

2. A copy of last year's Federal & state return.

3. All W-2 (wages), W-2G (gambling), 1099 (INT-interest, DIV-dividends, R-retirement distributions, B-sales, MISC-other income, G-government, any other types), K-1 (trust, estate, partnership, S-corp.), SSA-1099 (social security), RRB-1099 (railroad), 1098 (mortgage interest, etc., E-student, T-tuition), donation receipts, other documentation that may be required for your tax situation.



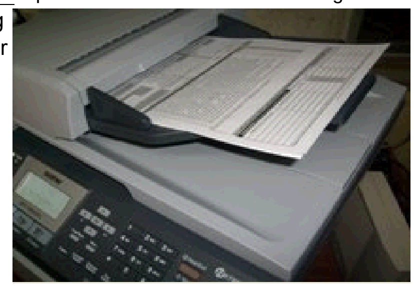
Do NOT try to fax smaller W-2s and 1099s. Since we only need one copy, (Copy B) of these forms, place 2 or 3 different forms on the glass of a copy machine and copy them so they all fit on one 8½x11 page. Be careful not to cut off part of a form. Do this for any irregularly sized pages, then you will only be faxing full 8½x11 pages. For 1099s printed on 2 sides, make 1 sided copies and collate the copies in numerical order before faxing.

1. We will then contact you via e-mail notifying you if any additional information is needed, our fee and the anticipated completion date.

2. After completion, we will e-mail you forms for signature. After signing and faxing these forms back, we will then E-file your return and send you a printed copy for your records.

Should you desire, you may also scan and e-mail your information to:

taxprep@taxextras.com

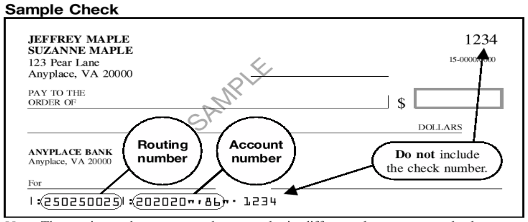


It's best to use a fax with a large document feeder so all of the pages are sent as 1 fax.

Direct Deposit - Enter bank info at top of page 1

Assumes a checking account unless the Savings box is checked. Names on account must match names on the return.

Sample Check



Note. The routing and account numbers may be in different places on your check.

Enter ANY Estimated Tax Payments You Made (Check copies not needed)

Quarter:	Exact Date Paid:	Federal Amt.	Date(if not same)	State Amt.
1st - was due 4/15/07. .	_ _/_ _/_ _		_ _/_ _/_ _	
2nd - due on 6/15/07. .	_ _/_ _/_ _		_ _/_ _/_ _	
3rd - due on 9/15/07. .	_ _/_ _/_ _		_ _/_ _/_ _	
4th - due 1/15/2008. . .	_ _/_ _/_ _		_ _/_ _/_ _	

Additional Questions

Additional Questions	Taxpayer	Spouse
17. If separated from spouse, enter date _ _ / _ _ / _ _ and Yes if still apart at year-end . . . . ☐ Spouse Itemizes . .		
18. Enter Yes if you (or your spouse) can be claimed as a dependent on someone else's tax return		
19. Enter Yes if you would like to designate $3 from your tax liability to the Presidential election fund		
20. Enter Yes if there has been changes made to a prior year tax return that you are aware of (Explain below) . .		
21. Enter Yes if you have made any gifts of money or property that exceeds $12,000 to any one individual		
22. Enter the approximate value of these assets that you hold: ☐ Annuities ☐ U.S. savings bonds ☐ Roth IRAs		
23. Enter the dollar amount of any retirement plan distributions that you "rolled over" into another plan this year .		
24. Enter Yes if you used about 8% or more of your income to pay medical expenses(i.e.$4000 paid on $50000 Inc.)		

Enter any additional comments here:

To try **Itemizing Deductions** complete this section

	To try Itemizing Deductions complete this section	Taxpayer	Spouse
If answer to question 24 is **Yes**, complete these first 6 lines	Health insurance premiums you personally paid		
	Long term care insurance premiums you paid		
	The part of prescription costs you paid		
	The part of doctor, dentist, hospital bills you paid		
	Eyeglasses, hearing aids & other equipment		
	Miles driven for medical reasons (i.e.doctor visits)		
	Additional home real estate taxes (i.e.vacation) (See 14. also)		
	How much sales tax do you pay where you live (i.e. 8.25%)?		
	Mortgage interest paid not found on 1098s you've furnished		
	How much margin interest did you pay to hold your investments		
	Cash/check donations with receipt/canceled check		
	Cash/check donations without receipt		
	Thrift shop value of items donated to charity (must have receipts)		
	Number of miles driven for charitable work (i.e.food pantry)		
	☐ Union dues ☐ Professional fees ☐ Uniform costs ☐ Tools		
	Did you have unreimbursed job or travel expenses? (Explain)		
	Tax preparation fees you paid last year (include software bought)		
	Investment expenses (explain) / safe deposit box fees		
	Other:		