

2014 TAX INFORMATION QUESTIONNAIRE- YOU ONLY NEED CHECK THE BOXES THAT APPLY TO YOU
STEVEN E BURNS FINANCIAL SERVICES www.steveneburns.com **828-287-9789 cell 828-980-**

Name: _____ SSN: _____

Yes	No	General Information	
		<ol style="list-style-type: none"> Were there any changes to your filing status or number of dependents during 2014? Can you or your spouse be claimed as a dependent by someone else? Did you incur any childcare expenses? Did you have a change in residence or job location during the year? Did you move during 2014? From where? _____ Date of move _____ Did you reside in more than one state during 2014? If yes, which states? _____ Did you receive any notices from the IRS or the state taxing agency? If yes, please attach. 	
Yes	No	Income Information	
		<ol style="list-style-type: none"> Have you received all W-2s from all employers? How many W-2s are attached? _____ Did you use your vehicle on the job other than for commuting to work? Did you have an employer-provided vehicle which you drove home or used personally? If so, enter the lease value. \$ _____ Did you work out of town at any time during the year? Did you earn income from a state other than the state in which you live? If yes, what state and how much? _____ Did you or your spouse receive any tips not reported to your (or your spouse's) employer? Did you receive any disability income during the year? \$ _____ Attach 1099-R. Did you have an interest in or signature over a bank or brokerage account in a foreign country? Were you a grantor or transferor to a foreign trust? Did you earn interest from, or are you an authorized signature holder on, a foreign bank account? Did you have any income from, or pay taxes to, a foreign country? Did you engage in any bartering transactions during 2014? Did you surrender any U.S. Savings Bonds during 2014? Did you receive any state or local income tax refunds from prior years? Do you or your spouse have any IRA accounts? Did you recharacterize any IRAs this year? Did you or your spouse "roll over" a profit-sharing or retirement plan distribution into another plan? Did you receive a Schedule K-1 from a partnership, S corporation, or trust? If so, please attach. Did you or your spouse receive any social security benefits during the year? Attach Form(s) SSA-1099. Did you receive any type of prize, award, or gambling winnings during 2014? Did you receive any of the following: Unemployment Income, Combat Pay, Jury Duty and/or Alimony, or Maintenance Received? If so, what and how much? _____ Did you receive any income not shown in this organizer? If so, please list. _____ Does anyone owe you money that has become uncollectible? _____ 	
<p>Comments: _____</p> <p>_____</p>			