



Questions Pertaining to Your 2003 Tax Return	Y / N + Details
Were any changes made to your tax return last year?	
Did you live in multiple states last year? If so then which states and dates of domicile?	
To the best of your knowledge, do you have all necessary information to complete your tax return?	
Are your W-2's, 1099's , etc. accurate?	
If you are a new client, did the receptionist make a copy of your households SS Cards?	
Did you have any self-employment or serious hobby income and expenses?	
Did you have any pension or retirement income, investment interest, dividends, or capital gains?	
Did you have any unemployment income?	
Did you contribute to a traditional individual retirement account (IRA)?	
Did you incur accredited school education expenses, including tuition, class fees, and books? What status (freshman, sophomore, full-time, part-time student, etc.) in school at beginning of calendar year?	
Did you pay interest on any student loans?	
Did you move over 50 miles because of a change in work?	
Did have medical expenses that exceeded 7.5% of your income including health insurance premiums, eye care, dental care, prescription drugs, other Dr. visits, and medical miles driven?	
Did you assume a new or refinanced home mortgage?	
Did you contribute cash, property, or miles to any charitable organizations?	
Did you contribute to any qualifying youth or rehabilitation facilities in Idaho (i.e. Idaho Youth Ranch or The Arc)?	
Did you have a personal casualty or theft loss, that was not fully reimbursed and exceeded 10% of your income in value?	
Did you have significant w-2 income-related work expenses?	
Did you have paid childcare? How Much?	
Did you provide support for anyone who is aged or disabled?	
Did you contribute to an IRA or other retirement plan?	
Did you withdraw money from a retirement plan between 1999 and 2002 without doing a rollover?	
Are you interested in having you refund(s) put in your bank account?	
If so, then what is your bank name _____ Routing number (from check, not deposit slip) _____ and account number? _____	
Are you considering in a refund loan?	
Are you interested in having tax preparation fees deducted from your refund, for an additional fee?	
Are you interested in a tax planning session?	
Are you interested in an independent, complimentary financial life planning session, including a review of your investments, retirement plans, education plans, budget, life insurance, long-term care insurance, and/or health insurance?	