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If any of the following items pertain to you or your spouse for 2014,
please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes	No	
☐	☐	Do you have and use e-mail? If so, please provide us with your current e-mail address: ____
☐	☐	Do we have permission to send information to your e-mail address?
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Could you be claimed as a dependent on another person's tax return for 2014?

DEPENDENTS

Yes	No	
☐	☐	Were there any changes in dependents?
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2014?
☐	☐	Did you have any children under age 19 or full-time students under age 24 at the end of 2014, with interest and dividend income in excess of $950, or total investment income in excess of $1,900?
☐	☐	If you are divorced did any child live with you in your home for over half the year? If so, list names of children_______________________________________
☐	☐	Has your dependent college student child already filed his/her tax return? If so, please let us know if that child claimed an exemption for him/herself.
☐	☐	Do you support your parents or other family member other than children?

HEALTH CARE COVERAGE

Yes	No	
☐	☐	Did you and your dependents have healthcare coverage for the full-year?
☐	☐	Did you receive any of the following IRS Documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) If so, please attach.

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☐ ☐ If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship? If you received an exemption certificate, please attach.

INCOME

Yes	No	
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
☐	☐	Did you receive any disability income?
☐	☐	Did you have any foreign income or pay any foreign taxes (outside of mutual funds)?

PURCHASES, SALES AND DEBT

Yes	No	
☐	☐	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
☐	☐	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
☐	☐	Did you buy or sell any stocks, bonds or other investment property in 2014?
☐	☐	Did you receive, exercise or sell employment stock options - RSU, NQ, ISO? If so, please provide last pay stub of the year, company breakdown and brokerage statements of options that were exercised.
☐	☐	Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2015?
☐	☐	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, send HUD settlement sheets.
☐	☐	Did you purchase aU.S. home in 2014 while you were overseas on official extended duty?
☐	☐	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy source?
☐	☐	Did you have any debts cancelled or forgiven? Did you receive a 1099-C or 1099-A? Please attach.

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☐ ☐ Does anyone owe you money which has become uncollectible?

RETIREMENT PLANS

Yes No

☐ ☐ Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you make a contribution to a retirement plan (401(k), IRA (Due April 15), SEP (Due September 15), SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you transfer or rollover any amount from one retirement plan to another retirement plan?

☐ ☐ Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2014?

☐ ☐ If you are over 70 1/2, did you take Required Minimum Distribution (RMD)?

☐ ☐ Do you want to contribute to an IRA or Roth IRA before April 15th?

EDUCATION

Yes No

☐ ☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

☐ ☐ Did the student complete the first 4 years of post-secondary education before 2014?

ITEMIZED DEDUCTIONS

Yes No

☐ ☐ Did you incur a loss because of damaged or stolen property?

☐ ☐ Did you use your car on the job (other than to and from work)?

☐ ☐ Do you have long-term care insurance? If so, send proof of premium?

☐ ☐ Did you contribute more than $500 of noncash charity? If so, please provide for us what you originally paid for those items.

☐ ☐ Do you own more than one home that is NOT a rental property?

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☐ ☐ If yes above, do the mortgage principals exceed $1M for all personal residences? Please help us by indicating which mortgage statements belong to which house, including rentals.

ESTIMATED TAXES

Yes	No	
☐	☐	Did you make quarterly estimated tax payments? If so, please send copies of payments made and dates they were made.
☐	☐	Did you apply an overpayment of 2013 taxes to your 2014 estimated tax (instead of being refunded)?
☐	☐	If you have an overpayment of 2014 taxes, do you want the excess applied to your 2015 estimated tax (instead of being refunded)?
☐	☐	If you are in a refund status, do you want it direct deposited? If so, has your bank account changed since last year?
☐	☐	Do you expect your 2015 taxable income and withholdings to be different from 2014?

MISCELLANEOUS

Yes	No	
☐	☐	Do you want to electronically file your tax return?
☐	☐	Do you want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	Does your spouse want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	Did you work out of town for part of the year?
☐	☐	Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, life insurance or other financial account? Do accounts together total $10,000 or more on any day of 2014?
☐	☐	Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
☐	☐	Was your home rented out or used for business?

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☐ ☐ Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

☐ ☐ Do you have an HSA? If so, is it an individual or family plan.

☐ ☐ Did you incur moving expenses due to a change of employment?

☐ ☐ Did you engage the services of any household employees?

☐ ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

☐ ☐ Did you or your spouse make any gifts to an individual that total more than $14,000, or any gifts to a trust?

☐ ☐ Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2014?

☐ ☐ Do you have a Schedule C? If so, did you issue 1099's?

EXTENSION

Yes No

☐ ☐ We (I), give Kathleen M Zaffore PC CPAs our (my) permission to file an extension of time to file our (my) tax return. This will extend the due date of filing the 2014 return from April 15, 2015 to October 15, 2015. This extension is for an extension of time to file the 2014 tax return, not an extension of time to pay any tax owed.

Signature ____ Date _________________

Signature ____ Date__________________

Under current law, we need your permission in writing to speak to you about financial instruments designed to reduce your current tax (such as IRAs, SEPs-remember, we do not sell any financial instruments, but we would like to be able to advise you/talk with you).

☐ ☐ We (I), give *Kathleen M Zaffore PC CPAs* our (my) permission to speak to us (me) regarding financial instruments designed to reduce current tax for the 2014 tax return.

Signature ____ Date _________________

Signature ____ Date__________________

☐ ☐ Did you read the Taxpayer Letter included in this package? If not, please do so there is a lot of important information included.

Please see our letter on our website for additional information regarding extensions.