

2015	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2015, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have and use e-mail? If so, please provide us with your current e-mail address:

_____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Do we have permission to send information to your e-mail address? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2015? |

DEPENDENTS

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2015? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2015, with interest and dividend income in excess of \$1000, or total investment income in excess of \$2,000? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you are divorced did any child live with you in your home for over half the year? If so, list names of children _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | 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. |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you support your parents or other family member other than children? |

HEALTH CARE COVERAGE

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have health care coverage for the full-year? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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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-------------	-------------	-----------	--------------------------------

<input type="checkbox"/>	<input type="checkbox"/>	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.
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<input type="checkbox"/>	<input type="checkbox"/>	Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2015?
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INCOME

Yes	No
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<input type="checkbox"/>	<input type="checkbox"/>	Did you receive unreported tip income of \$20 or more in any month?
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<input type="checkbox"/>	<input type="checkbox"/>	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?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any disability income?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you have any foreign income or pay any foreign taxes (outside of mutual funds)?
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PURCHASES, SALES AND DEBT

Yes	No
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<input type="checkbox"/>	<input type="checkbox"/>	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you buy or sell any stocks, bonds or other investment property in 2015?
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<input type="checkbox"/>	<input type="checkbox"/>	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.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2015?
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<input type="checkbox"/>	<input type="checkbox"/>	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.
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<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase a U.S. home in 2015 while you were overseas on official extended duty?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy source?
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2015

1040

US

Miscellaneous Questions

Did you have any debt cancelled or forgiven? Did you receive a 1099-C or 1099-A? Please attach.

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.)? Please include 1099-R.

Did you make a contribution to a retirement plan (401(k), IRA, Roth or Traditional (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 2015?

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 you receive any tuition reimbursements from your employer?

Did the student complete the first 4 years of post-secondary education before 2015?

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?

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Did you contribute more than \$500 non cash items to 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?

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 2014 taxes to your 2015 estimated tax (instead of being refunded)?

If you have an overpayment of 2015 taxes, do you want the excess applied to your 2016 estimated tax (instead of being refunded)?

If you are in a refund status, do you want it direct deposited? If so, provide your information below?

Bank Routing Number _____

Account Number _____

Do you expect your 2016 taxable income and withholdings to be different from 2015?

MISCELLANEOUS

Yes No

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 2015?

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?

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- Was your home rented out or used for business?
- Did you purchase items online or from out of state for which you did not pay sales tax? If so, please provide the total amount you paid in 2015, as you will owe use tax to Colorado this year. \$ _____
- 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?
- If you have a business, 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 2015 return from April 15, 2016 to October 17, 2016. **This extension is for an extension of time to file the 2015 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 2015 tax return.

Signature _____ Date _____

Signature _____ Date _____

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