

# Intake Questionnaire

# RELIABLE INCOME TAX

PORTLAND, OREGON • ESTD 1945

*"You" refers to both taxpayer and spouse*

<b>PERSONAL INFORMATION</b>	Yes	No	Did your marital status change during the year?
	Yes	No	Did your address change during the year?
	Yes	No	Could you be claimed as a dependent on another person's tax return?
	Yes	No	Were there any changes in dependents?
	Yes	No	Would you like secure online access to your tax records? If yes, provide e-mail address:
<b>INCOME, PURCHASES, SALES, AND DEBT</b>	Yes	No	Did you have any foreign income or pay any foreign taxes?
	Yes	No	Did you start a business, purchase rental property, or acquire an interest in a partnership, S corporation, or trust?
	Yes	No	Did you purchase or dispose of any business assets [furniture, equipment, vehicles (including personal vehicles where business use has been deducted), real estate, etc.], or convert any personal assets to business use?
	Yes	No	Did you sell or transfer any stock, sell rental or investment property, have any investments become worthless, or were you granted, or did you exercise, any employee stock options?
	Yes	No	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?
	Yes	No	Did you receive any income from an installment sale?
	Yes	No	Did you make residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell?
	Yes	No	Did you have a foreclosure, repossession, or any debt (including credit cards) cancelled?
	Yes	No	Did you earn any income from jury duty, prizes, awards, gambling or lottery winnings?
<b>ADJUSTMENTS AND DEDUCTIONS</b>	Yes	No	Did you or will you contribute to a retirement plan (IRA, SEP, SIMPLE, etc.) other than through your payroll withholding?
	Yes	No	Did you transfer/rollover any amount from one retirement plan to another plan?
	Yes	No	Did you work out of town for part of the year?
	Yes	No	Did you use your personal vehicle on the job (other than to and from work)?
	Yes	No	Was your home rented out or used for business?
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters?
	Yes	No	Did you pay for child or dependent care so you could work or go to school?
<b>MISCELLANEOUS</b>	Yes	No	Did you pay estimated taxes or apply an overpayment of last year's taxes to your current year's estimated tax?
	Yes	No	Do you anticipate significant changes in income or deductions next year, i.e. retirement?
	Yes	No	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, or other financial account?
	Yes	No	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?
	Yes	No	Did you incur moving expenses due to a change of employment which was more than 50 miles away from your previous place of employment?
	Yes	No	Did you engage the services of a household employees, such as a nanny or housekeeper?
	Yes	No	Were you notified or audited by the Internal Revenue Service or a State taxing agency?
	Yes	No	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college or university?