Client Pre-Interview Worksheet

Name ______________________________ Date ______________

Street ______________________________

City, State, Zip ______________________________

LandLine ______________________________

Cell Phone- Taxpayer ______________________________ Cell Phone - Spouse ______________________________

Work Phone - Taxpayer ______________________________ Work Phone - Spouse ______________________________

Email - Taxpayer ______________________________ Email - Spouse ______________________________

1. Did you own any securities that became worthless during the year? _____

2. Did you (or do you plan to before April 17, 2012) contribute to a traditional IRA or Roth IRA for 2011? _____

3. Are you a K - 12 teacher or principal? ____ If yes, did you incur out-of-pocket costs? _____

4. Have you had any debts cancelled or reduced (including credit cards)? _____

5. Did you or your spouse have a financial interest in, or signature authority over any foreign financial accounts at any time during last year? _____

6. Did you contribute to a 529 Plan (Education Savings Account) last year? _____

7. Do you have long term care insurance? _____

8. Did you make any energy improvements to your home last year? _____

9. Did you make any estimated tax payments last year? _____

10. Do you have an HSA Plan (Health Savings Account)? _____

11. Did you refinance your mortgage last year? _____

12. Has your bank account changed for Direct Deposit of Refund? _____