

ADDITIONAL QUESTIONS:
PLEASE LET US KNOW IF ANY OF THESE EVENTS HAPPENED IN YOUR LIFE

LIFE EVENTS

- MARITAL STATUS CHANGED
- ADDRESS CHANGED?
- NEW BANK ACCOUNT FOR DIRECT DEPOSIT?
- CHANGES IN THE PEOPLE THAT LIVED AT YOUR RESIDENCE
- HAD A BABY
- ANY OF YOUR DEPENDENT CHILDREN COLLECT INTEREST AND/OR DIVIDEND INCOME
- BANKRUPTCY OR CANCELLED DEBT
- REPAY FIRST TIME HOMEBUYER CREDIT
- ADOPT
- ARE YOU SUPPORTING A PARENT
- DID YOU REPLACE YOUR BUSINESS VEHICLE
- CONTRIBUTE MONEY TO A CO STATE TUITION PROGRAM
- MAKE LONG TERM DISABILITY INSURANCE PAYMENTS

INCOME

- ALIMONY RECEIVED OR PAID
- SIDE BUSINESS INCOME (ALL INCOME, EVEN FROM HOBBIES, MUST BE CLAIMED)
- UNEMPLOYMENT COMPENSATION
- OTHER INCOME: (Gambling, lottery, prizes, awards, jury duty, etc.)
- K-1'S - INTEREST IN A PARTNERSHIP OR CORPORATION
- RECEIVE A CANCELLATION OF DEBT

DEDUCTIONS

- CONTRIBUTION TO RETIREMENT ACCOUNT:
 - o IRA, ROTH, OTHER
- EDUCATIONAL EXPENSES
 - o TUITION 1098 T
 - o STUDENT LOAN INTEREST
 - o BOOKS AND OTHER DEDUCTIBLE EXPENSES
 - o 529 CONTRIBUTIONS PLAN IT MUST BE A COLORADO PLAN!
- HEALTH SAVINGS ACCOUNT
- CHILD CARE EXPENSES
 - o DEPENDENT CARE TAKEN FROM CHECK?
- MAKE ESTIMATED PAYMENTS FED & STATE (Dates and amounts)
- BUY, SELL, REFINANCED, FORECLOSED OR ABANDONED A HOME
- DID YOU OPEN A NEW HOME EQUITY LOAN
- LONG TERM CARE PAYMENTS
- ENERGY EFFICIENT PROPERTY

NEW CLIENTS

- HAVE CARRYOVER LOSS FROM PREVIOUS YEAR
- OWED STATE PREVIOUS YEAR
- STATE REFUND OR OWE FROM PREVIOUS YEAR

DID YOU HAVE ANY OF THESE LIFE CHANGING EVENTS?