US Interview Questions 2007

	Yes	No
1. Wages, salaries, or any other employment compensation?	☐	☐
2. Tips? If "Yes", ☐ Taxpayer ☐ Spouse	☐	☐
3. Interest on savings or checking, cash U.S. bonds, or receive stock dividends?	☐	☐
4. Social security or railroad retirement?	☐	☐
5. Lump sum from an employer sponsored plan and the recipient and/or employee was born before 1936?	☐	☐
6. Pension or IRA distributions and the recipient was under 59 1/2? If "Yes", ☐ Taxpayer ☐ Spouse	☐	☐
7. Other pension, annuity, IRA, or retirement income?	☐	☐
8. Unemployment compensation?	☐	☐
9. Alimony?	☐	☐
10 Self-employment and/or operation of a business?	☐	☐
11. Operation of a farm?	☐	☐
12. Rental of land and property for agricultural purposes?	☐	☐
13. Other rental property?	☐	☐
14. Gambling winnings? (lottery, race track, casinos, raffles)	☐	☐
15. Royalties?	☐	☐
16. Any miscellaneous income? (prizes, awards, jury duty)	☐	☐
17. W-2?	☐	☐
18. W-2G?	☐	☐
19. 1099R?	☐	☐
20. 1099INT?	☐	☐
21. 1099DIV?	☐	☐
22. 1099MISC?	☐	☐
23. 1099B?	☐	☐
24. 1099S?	☐	☐
25. 1099G? (Other than unemployment or state tax refund)	☐	☐
26. Any other 1099?	☐	☐
27. Schedules K-1? partnership or S corporation ☐ or estates or trust ☐	☐	☐
28. IRS notice of a change to a prior year's return?	☐	☐
29. Closing statements from real estate sales?	☐	☐
30. Stock, mutual fund, or other nonbusiness related security?	☐	☐
31. Your personal residence?	☐	☐
32. Rental property?	☐	☐
33. Property relating to a business or farm?	☐	☐
34. Any other business property not listed above? (equipment, land)	☐	☐
35. Did the sale of any property above involve a bartering agreement?	☐	☐
36. Are you receiving installment payments on any property sold?	☐	☐
37. Have a home mortgage?	☐	☐
38. Use a portion of your home exclusively for self-employment?	☐	☐
39. Have medical expenses or pay for health insurance?	☐	☐
40. Make substantial contributions to charity, church, etc.?	☐	☐
If "Yes", did you make over $500 in noncash contributions?	☐	☐
41. Suffer a loss from a casualty? (fire, theft, natural disaster)	☐	☐
42. Purchase a car, boat, aircraft, motor home, or home building materials in 2007 or keep receipts on all sales tax items purchased in 2007?	☐	☐
43. Itemize deductions last year and receive a state tax refund?	☐	☐
44. Incur out-of-pocket expenses or use your personal auto on the job?	☐	☐
45. Move to be closer to a new job?	☐	☐
46. Send prepayments to IRS and/or state for your current year tax liability (estimated taxes) or apply an overpayment from 2005?	☐	☐
47. Have any household employees to whom you paid $1,000 or more?	☐	☐
48. Have a qualified Federal fuel tax credit?	☐	☐
49. Contribute to an ☐ IRA ☐ SEP ☐ Keogh ☐ Simple retirement plan?	☐	☐
50. Get claimed (or were eligible to be claimed) as a dependent on someone else's income tax return?	☐	☐
51. Did your children receive more than $800 and less than $8,000 from interest and dividends that you wish to claim on your own tax return instead of your child's return?	☐	☐
52. Did you pay child or dependent care expenses?	☐	☐
53. Did you pay qualified postsecondary education tuition and related expenses for yourself, your spouse, or your dependents?	☐	☐
54. Did you cash any U.S. EE or I Bonds to pay for postsecondary education for yourself, your spouse, or your dependents?	☐	☐
55. Did you pay interest on higher education loans?	☐	☐
56. Were you a pre-college educator who purchased books or classroom supplies, for which you were not reimbursed?	☐	☐
57. Were there any births, adoptions, divorces, marriages or deaths in your household?	☐	☐

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