

2011	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2011, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <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 2011? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <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 2011? |
| <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 2011, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900? |

INCOME

- | | | |
|--------------------------|--------------------------|--|
| <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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any employee stock, restricted stock, stock options or purchase employer stock at a discount during 2011? |

INVESTMENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds, mutual funds or other securities in 2011? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any stock options or restricted stock become vested during 2011? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you exercise any stock options during 2011? |
| <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 2012? |

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-------------	-------------	-----------	--------------------------------

PURCHASES, SALES AND DEBT

- Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
- Did you purchase a home in 2011 and you were overseas on official extended duty?
- Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources on your U.S. home?
- Did you have any debts cancelled or forgiven?
- Does anyone owe you money which has become uncollectible?

ITEMIZED DEDUCTIONS

- Did you incur a loss because of damaged or stolen property?
- Did you work out of town for part of the year?
- Did you use your car on the job (other than to and from work)?

EDUCATION

- 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 qualified college, university, or vocational school?

ESTIMATED TAXES

- Did you apply an overpayment of 2010 taxes to your 2011 estimated tax (instead of being refunded)?
- If you have an overpayment of 2011 taxes, do you want the excess applied to your 2012 estimated tax (instead of being refunded)?

2011	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

- Do you expect your 2012 taxable income and withholdings to be different from 2011?

RETIREMENT PLANS

- Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, Swiss Pillar 2 or 3, etc.)?
- Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, Swiss Pillar 2 or 3, 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?
- Did you convert a traditional, SEP, or SIMPLE IRA (or other qualified retirement plan) to a Roth IRA in 2010, and defer the taxable amount of the conversion to tax year 2011 and 2012?

MISCELLANEOUS

- 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 AIT Services?
- Do you want AIT Services to prepare Form TDF 90-22.1 Report of Foreign Bank and Financial Accounts (FBAR)?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
- Was your home rented out or used for business?
- 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?
- Did you incur moving expenses due to a change of employment?

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- 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 \$13,000, or any gifts to a trust?
- Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2010?

e-Filing

The IRS requires all professional tax preparers to electronically file tax returns unless specifically requested not to do so by the client. If you choose to electronically file your tax return, a copy of your completed tax return will be provided to you for review. After reviewing the return, you must send us a signed copy of Form 8879 e-File Authorization, included with your review copy, which will allow us to electronically file your return with the IRS. If you choose to paper file your tax return, you will be provided your completed tax return to sign and file with the IRS yourself, plus a copy of the return for your records.

- Do you want to electronically file your tax return? (Please note that there are instances where e-Filing is not allowed. If your return is not allowed for e-Filing, you will receive a paper return to sign and file.)
- If yes, do you want to receive a paper copy of your tax return to review. (You will receive an electronic copy for review if you check 'No'.)

If you do not want to electronically file your tax return, please read and sign the following statement:

My tax return preparer, Rebecca Heid, EA, has informed me that she may be required to electronically file my 2011 income tax return Form 1040 if she files it with the IRS on my behalf. I do not want to file my return electronically and choose to file my return on paper forms. My preparer will not file my paper return with the IRS. I will file my paper return with the IRS myself. I was not influenced by Rebecca Heid or any member of her firm to sign this statement.

Signature of Taxpayer(s)

Date