

**QUESTIONS SPECIFIC FOR NEW MEXICO**

1. a. Did you / your spouse physically reside in New Mexico in 2008 for 185 days or more? Taxpayer **YES / NO** Spouse **YES / NO**  
b. Were you /your spouse an inmate of a public institution in 2008 for a period of more than six months? TP **YES / NO** SP **YES / NO**  
c. Were you / your spouse a First Year Resident of New Mexico in 2008? (You need not have been physically present for the full 185 days.)  
Taxpayer **YES / NO** Spouse **YES / NO**  
d. Are you /your spouse a Returning Resident of New Mexico in 2008? TP **YES / NO** SP **YES / NO** **If Yes**, were you / your spouse  
a non-resident for at least one full tax year before returning? Taxpayer **YES / NO** Spouse **YES / NO**
- 
2. Did you / your spouse receive contributions refunded to you during 2008 from a New Mexico approved Section 529 College Savings Plan?  
**YES / NO** **If Yes**, how much did you receive? Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_
- 
3. Did you / your spouse contribute to a New Mexico-approved Section 529 College Savings Plan in 2008? **YES / NO** **If Yes**, how much?  
Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_ (This plan must be approved by the New Mexico Education Trust Board)
- 
4. Did you / your spouse have any unreimbursed, and uncompensated medical expenses in 2008? **YES / NO**  
**If Yes**, how much did you pay? \_\_\_\_\_ (Even if you can not itemize on your Federal Return, these expenses can be deducted on your NM State Return.)
- 
5. Did you have any additional children, who were members of your household in 2008, but they did not qualify as your dependents on your Federal  
Income Tax Return? **YES / NO** **If Yes**, please list their Name, date of birth (age) and Social Security Numbers below:
- | First Name | Last Name | Date of Birth (Age) | Social Security Number |
|------------|-----------|---------------------|------------------------|
| _____      | _____     | __ - __ - ____ ( )  | ____ - ____ - _____    |
| _____      | _____     | __ - __ - ____ ( )  | ____ - ____ - _____    |
- 
6. a. Did you / your spouse receive any public assistance, TANF or similar program, welfare or general assistance benefits, or Supplemental Security  
Income (SSI) in 2008? **YES / NO** **If Yes**, what was the total amount you received in 2008? Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_  
b. Did you / your spouse receive any gifts of cash or marketable tangible items in 2008? **YES / NO** **If Yes**, amount TP \_\_\_\_\_ SP \_\_\_\_\_  
c. Did you / your spouse receive any other income such as scholarships, grants, VA benefits, child support, cash prizes or awards in 2008?  
**YES / NO** **If Yes**, total amount received Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_
- 
7. Are you / your spouse age 65 or older and paid property tax on your principal place of residence in 2008? **YES / NO** **If Yes**, how much? \_\_\_\_\_  
Do not include any tax associated with land exceeding 5 acres. (Even if you can not itemize on your Federal Return, these expenses can be deductible on your NM State Return.)
- 
8. Did you / your spouse pay rent on your principal residence in 2008? **YES / NO** **If Yes**, how much? \_\_\_\_\_ Include any rent subsidy paid by a  
government entity to your landlord.
- 
9. If you have an overpayment on your return, would you like to donate to one or more of the following voluntary contribution funds? **YES / NO**  
**If Yes**, please fill in the amount: (Any donations will reduce your refund)
- |   |  |   |
|---|--|---|
| Share with Wildlife _____   | Veterans' National Cemetery Fund _____ | NM Substance Abuse Education Fund _____           |
| NM Forest Re-Leaf Program _____   | Kids in Parks Education Program _____  | National Guard Member and Family Assistance _____ |
| Amyotrophic Lateral Sclerosis Research Fund _____   |  |   |
| NM Political Parties Contribution (Max \$2) Taxpayer _____, Party _____ Spouse _____, Party _____ |  |   |
- 
10. Is there any other information you think we should know, credits you feel you are eligible for, or any other questions you have? **YES / NO**  
**If YES**, what would you like to add? \_\_\_\_\_
-