

**QUESTIONS SPECIFIC FOR NEW YORK**

1. Were you / your spouse a full year resident of New York State in 2008? Taxpayer **YES / NO** Spouse **YES / NO**  
Did you maintain a permanent place of abode in New York State for more than 11 months of 2008 and spent 184 days or more in New York State in 2008? Taxpayer **YES / NO** Spouse **YES / NO**
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2. What County and Public High School District did you live in on December 31, 2008? Please enter:  
County Name: \_\_\_\_\_ School District Name: \_\_\_\_\_ and 3 Digit Code \_\_\_ \_\_ \_
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3. Have you under reported your tax due on past returns? If yes, this year you can correct this without penalty. We can not do this for you. Just go to [www.nystax.gov](http://www.nystax.gov) and follow the prompts, answer a few questions, and submit your application electronically
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4. Did you / your spouse / or your dependent pay any College Tuition expenses during 2008? **YES / NO** If Yes, How much? \_\_\_\_\_  
(You may be able to claim either the college tuition itemized deduction or the college tuition credit. We will calculate which is best for your return.)
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5. Did you / your spouse contribute to a New York State 529 College Savings Plan in 2008? **YES / NO** If Yes, enter amount contributed  
Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_
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6. Did you / your spouse withdrawal funds, or close your New York State 529 College Savings Plan account, for a non-qualified purpose in 2008? **YES / NO** If Yes, was this amount previously claimed as a deduction on your New York return? **YES / NO**  
If Yes, amount previously claimed Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_
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7. Did you / your spouse receive a pension or other distribution from a NYS, Local, or Federal Government Pension Plan in 2008?  
**YES / NO** If Yes, a Tax Preparer may need to contact you. What phone number can you be reached at this evening? ( \_ \_ \_ ) \_ \_ \_ - \_ \_ \_ \_ .
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8. If you live in New York City or Younkers, a Tax Preparer may need to contact you for further information. What phone number can you be reached at this evening? ( \_ \_ \_ ) \_ \_ \_ - \_ \_ \_ \_ .
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9. New York State Sales or Use Tax : Did you purchase any items or service from an out-of-state retailer (such as from a catalog or over the internet) and not pay NY Tax? **YES / NO** If Yes, total amount of purchases made in 2008: \_\_\_\_\_  
Did you pay any other sales tax to the state where your purchases took place? **YES / NO**  
If Yes, amount paid in 2008 \_\_\_\_\_ (If client paid sales tax to the state where the item was originally purchased, they may be allowed a credit against their New York Use Tax).
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10. If you have an overpayment, would you like to donate to one or more of the following voluntary contribution funds? **YES / NO**  
(Any donation will reduce your refund)  
If **YES**, please fill in an amount:
- |   |                                       |                              |
|---|---------------------------------------|------------------------------|
| Return a Gift to Wildlife _____         | Alzheimer's Fund _____                | National 9/11 Memorial _____ |
| Missing / Exploited Children Fund _____ | Olympic Fund _____ (\$2.00 or \$4.00) |                              |
| Breast Cancer Research Fund _____       | Prostate Cancer Research fund _____   |                              |
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11. Do you think you may qualify for NYS Noncustodial Earned Income Credit (EIC)? **YES / NO** If Yes, a tax preparer will be contacting you for additional information. What phone number can you be reached at this evening? ( \_ \_ \_ ) \_ \_ \_ - \_ \_ \_ \_
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12. 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? \_\_\_\_\_