

QUESTIONS SPECIFIC FOR OHIO

1. What County did you live in on December 31, 2008? _____

2. Did you contribute to The Ohio Tuition Trust Authority's CollegeAdvantage 529 Savings Plan in 2008? **YES / NO**

IF YES, please list the following: *(Paid Preparer may contact you for additional information)*

Student's Full Name _____

Student's Age _____

Amount Contributed _____

3. Did you pay for any unsubsidized Health Insurance Premiums, Long-Term Care Insurance Premiums, & Excess Medical Expenses for you, your spouse or any dependents? **YES / NO** **IF YES**, Amount Paid _____

4. Ohio's 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 pay no tax? **YES / NO** **IF YES**, total amount of purchases made in 2008 _____

5. If you have an overpayment (Refund) on your Ohio Tax Return, would you like to donate all or part of it to one of the following voluntary contribution funds? **YES / NO** *(Any donation will reduce your refund)*

IF YES, please fill in amounts:

Military Injury Relief Fund _____ Ohio's wildlife species and conservation of endangered wildlife _____

Nature preserves, scenic rivers, and protection of endangered species _____

6. **Lump Sum Distribution Credit** Are you / your spouse age 65 years or older? **YES / NO**

If Yes, Did you / your spouse take a lump sum distribution in 2008? **YES / NO**

If Yes, You / your spouse may be eligible for this credit.

A Paid Preparer will contact you for additional information. What phone number will you be at this evening? (____) ____ - ____

7. Displaced Worker Training Credit

a) Did you / your spouse lose your job because the place you worked either permanently closed or moved, or because you employer abolished your job or shift? (this does not include temporary layoffs resulting from seasonal employment or temporary plant closings). **TP: YES / NO SP: YES / NO**

b) During the 12 month period beginning when you lost your job, did you pay for any displaced worker training? **TP: YES / NO SP: YES / NO**

c) While you were receiving displaced worker training, were you either unemployed or working no more than 20 hours per week? **TP: YES / NO SP: YES / NO**

If Yes, to all three questions for either the Taxpayer or Spouse, you may qualify for the **Displaced Worker Training Credit**. Paid Preparer will need to contact you for more information. What phone number can you be reached at tonight? ____ - ____ - ____

8. Retirement Income Credit

a) Did you / your spouse receive retirement benefits, annuities or distributions that were made from a pension, retirement or profit sharing plan?

(Social Security benefits do not qualify) **TP: YES / NO SP: YES / NO**

b) Did you receive this income because you have retired? **TP: YES / NO SP: YES / NO**

9. 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?
