

QUESTIONS SPECIFIC FOR VIRGINIA

1. What County / Code did you live in on January 1, 2009? County Name: _____ 3 Digit Code: ____ _
2. a. Do you / your spouse consider Virginia your permanent home (legal residence)? Taxpayer **YES / NO** Spouse **YES / NO**
b. Do you maintain an abode in Virginia and were physically present in Virginia for more than 183 days? Taxpayer **YES / NO** Spouse **YES / NO**
c. Are you / your spouse a member of the Armed Forces or US Congress? Taxpayer **YES / NO** Spouse **YES / NO**
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3. a. Did you / your spouse contribute to a Virginia College Savings Plan Prepaid Tuition Contract Payments and Savings Account in 2008?
(Previously called the Virginia Higher Education Tuition Trust Fund) **YES / NO**
If Yes, enter amount contributed and you current age: Taxpayer _____ Age _____ Spouse _____ Age _____
b. If 2008 contribution is less than \$2000.00, do you have any carry over from previous years? YES / NO If Yes, how much? _____
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4. Did you / your spouse receive a distribution or refund from the Virginia College Savings Plan, (Previously called the Virginia Higher Education Tuition Trust Fund) in 2008? **YES / NO** **If Yes**, enter the amount received in 2008 TP _____ SP _____
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5. Were you / your spouse a *Medal of Honor Recipient* in 2008? YES / NO **If Yes**, enter the amount of Military Retirement Income you received as an individual awarded this honor: Taxpayer _____ Spouse _____
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6. Are you / your spouse a licensed primary or secondary school teacher, that has unreimbursed tuition costs incurred to attend continuing teacher education courses that are required as a condition of employment? **YES / NO** **If Yes**, will this amount be deducted from your Federal Adjusted Gross Income? **YES / NO** **If No**, enter amount paid by: Taxpayer _____ Spouse _____
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7. Did you / your spouse pay Long-Term Health Care Premiums in 2008? **YES / NO** **If Yes**, will you be itemizing on your Federal Schedule A? **YES / NO** **If No**, enter amount paid by: Taxpayer _____ Spouse _____ (*may be deductible on state return*)
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8. Did you purchase Energy Efficient Equipment or appliances in 2008? **YES / NO** **If Yes**, what was the amount of **Sales Tax you paid** on the Equipment or appliance? _____
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9. **Consumer's Use Tax**
You are required to pay Consumer's Use Tax if, during the year you purchased: *merchandise by telephone, Internet, or Television and no sales tax was charged, merchandise while outside of Virginia and paid no sales tax, more than \$100 in merchandise by mail and no sales tax was charged.* Do you owe this tax? **YES / NO** **If Yes**, enter amount spent: _____
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10. If you have an overpayment, would you like to donate to one or more qualifying organizations? **YES / NO**
(*Any donation will reduce your refund*) **If YES**, please complete:
Organizations Name: _____ / Code: ____ _ and Amount of Donation: _____
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11. Would you like to contribute to an eligible Public School Foundation? **YES / NO** **If Yes**, please complete the Name and Code:
Foundation Name: _____ Foundation Code: ____ _
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12. Did you / your spouse make Political Contributions to a Candidate for State or Local Political Office? **YES / NO** **If Yes**, (50% your contribution is deductible with a max of \$25 single and \$50 MFJ) Contribution Amount: TP _____ SP _____
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13. 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?
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