

**Business/Investment Questions**

**ORG4**

NAME:

Yes No

- 1 Did you receive stock from a stock bonus plan with your employer? .....    
(Do not include stock sales included on your W-2.)
- 2 Did you buy or sell any stocks or bonds in 2017? .....    
If **yes**, attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.
- 3 Did you surrender any U.S. savings bonds during 2017? .....
- 4 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? .....
- 5 Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation? .....
- 6 Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations? .....
- 7 Do you have any investments for which you were **not** personally 'at risk' (other than sole proprietorship or farm)? .....
- 8 Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2017? .....
- 9 Did you sell property or equipment on installment in 2017? .....
- 10 Did you have any business related educational expenses? .....
- 11 Did you do a 'like-kind' exchange of property in 2017? .....
- 12 Do you have records, as described below, to support expenses? .....

Tax law and IRS regulations allow deductions for travel and entertainment if adequate records can be presented. Information must include: **1** Amount; **2** Time and place; **3** Date; **4** Business purpose; **5** Description of gift(s); and **6** Business relationship of recipient.

- 13 Did you purchase special fuels for non-highway use? .....    
If **yes**, please list the type of use and the number of gallons for each fuel.

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- 14 Was Form 8903 (Domestic Production Activities Deduction) included in your 2016 federal income tax return? .....