2011

Taxpayer Organizer

This easy to use organizer has been prepared to assist you in collecting information for your 2011 Individual Income Tax Return.

The organizer checklist will assist you in compiling complete and accurate tax data and make it possible to take full advantage of all allowable deductions. If necessary, attach additional support with pertinent facts that may not have been requested in this organizer.

If you have any questions, please make note of them within the booklet, so that we can discuss them with you when we prepare your return.

Please provide all record and necessary information to include:

- Prior year federal and state return (new clients only)
- W2's for wages, salaries, tips and pensions
- 1098's for mortgage interest paid to financial institutions
- All itemized deductions including real estate taxes paid, charitable contributions, medical expenses and employee business expenses
- 1099's for interest, dividends, state tax refunds and other payments
- K-1's from partnerships, S corporations, estates and trusts
- All other forms of income including self employment
- Additional correspondence from tax agencies if any

Please contact us with any questions. We appreciate the opportunity to serve you.

Sincerely,

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2011

Tax Information Questionnaire

Name: ___________________________________

Email address: ________________________________

* Please provide any changes to your address, home or cell phone in the space provided at the end of the questionnaire

The following questions help us understand your current year tax situation. If you are filing jointly, each question also applies to your spouse. Please answer each question by circling Yes or No. For every questions answered Yes, please provide details at the end of the questionnaire. If a question does not pertain to you, please circle no. If you are unsure of an answer; leave that question blank.

Yes No 1. Electronic filing is mandated for most taxpayers with some exceptions. Do you approve of your tax return being electronically filed?

Yes No 2. Would you like to have an electronic copy of your tax return (PDF file) instead of a paper copy?

Yes No 3. Did your marital status change during the year?

Yes No 4. Were you a resident of, or did you have income in more than one state during the year?

Yes No 5. Do you wish to have $3 (or $6 on a joint return) of your taxes applied to the Presidential Campaign Fund (this will not affect the amount of refund or balance due on your tax return)?

Yes No 6. On your state tax return, do you wish to make any political contributions or other type of contribution?

Yes No 7. Do you have any dependents living with you or are you supporting anyone not living with you? If yes, provide details if there were any changes to any dependents in your household (marriages, deaths, etc).

Yes No 8. Did any of your dependent children under age 18 (24 if a college student) have any Income (wages, interest, etc.)?

Yes No 9. Are you or any dependents blind and/or disabled? Please provide details including any disability income received.

Yes No 10. Did you incur child care or dependent care expenses?

Yes No 11. Did you cash any Series EE or Series I U.S. Bonds that were issued after 1989? and paid qualified higher education expenses?

Yes No 12. Did you or any member of your household pay educational expenses for post secondary education including trade schools?

Yes No 13. Did you buy, sell or trade any assets?

Yes No 14. Outside of W-2 contributions (401k, 403b etc.) did you contribute to or receive a distribution from any retirement plan or did you convert any retirement funds to ROTH funds?

Yes No 15. Did you receive or pay any alimony or separate maintenance payments?

Yes No 16. Did you have any moving expenses?

Yes No 17. If you are self-employed, did you pay any health or long-term care insurance premiums?

Yes No If you answered Yes to the above, were either you or your spouse Eligible to participate in an employer sponsored health or long-term care insurance plan?

Yes No 18. Did you contribute to or receive a distribution from a Health Savings Account

Yes No 19. Did you contribute to or receive any COBRA health insurance premium assistance during 2011?

Yes No 20. Did you make any cash or non-cash charitable contributions?

Yes No 21. Did you make any large purchases or home improvements? (e.g. purchase airplane or vehicles)? If yes, provide details of each purchase including the date of purchase, amount of purchase and amount of sales tax paid

Yes No 22. Did you have any casualty or theft losses?

Yes No 23. Did you have purchasing, selling, refinancing, financing, or foreclosing transactions on your personal residence or any other real estate? If yes, please provide the settlement document (HUD-1), Form 1099-S, Form 1099-C, or other related documentation if applicable.

Yes No 24. Did you have any debt that was cancelled in 2011? (i.e. debt that you owed to a creditor that you are no longer required to pay)? If yes, please provide details and copies of any Form 1099-C received.

Yes No 25. Did you COBRA health insurance premiums as a result of becoming unemployed between Sept. 1, 2008 and May 31, 2010?

Yes No 26. Did you receive the First-Time Homebuyer Credit from purchasing a home prior to 1/1/2009?

Yes No 27. Did you dispose of a home for which you received any First- Time Homebuyer Credit?

Yes No 28. If you are the recipient of a PBGC or TAA pension, did you pay health insurance premiums?

Yes No 29. Did you adopt a child during the year 2011?

Yes No 30. Do you own a vacation home that was rented to someone else at anytime?

Yes No 31. Did you make any gifts directly or through a trust which exceeded $13,000 per person?

Yes No 32. Did you pay wages of more than $1,700 to any one household employee?

Yes No 33. Have you provided ALL your income from ALL sources? If not, please use the space at the end to list any other income.

Yes No 34. Have you provided ALL your deductions? If you are uncertain about an item then provide details.

Yes No 35. Has the IRS/State/Local taxing authority made you aware, or are you aware of, any changes to your income, deductions and credits reported on any prior year tax return?

Yes No 36. Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country?

Yes No 37. For 2012 do you expect a significant fluctuation in your income, deductions or withholding?

Yes No 38. For 2012, do you need or want estimated tax payment vouchers prepared?

Yes No 39. Did you make any federal or state estimated tax payments for 2011? If yes, provide the date and amount of each payment.

Yes No 40. Did you purchase a hybrid or a “plug in electric” vehicle in 2011.

Please use the following space to provide additional information regarding the above questions (indicate the question number). This space can also be used for any other tax information, questions or personal information updates you may have.