

2011 Organizer

prepared by:

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(New Client)

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2011 TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name (New Client)		Last name	
First name		First name	
Middle Initial	Suffix	Middle Initial	Suffix
Social security number		Social security number	
Occupation		Occupation	
Work phone		Work phone	
Ext		Ext	
Cell phone		Cell phone	
E-mail address		E-mail address	
Date of birth		Date of birth	
Address		Apartment number	
City		State	
Home phone		ZIP Code	
Fax number			

Dependent Information					
First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense
-----		-----			
-----		-----			
-----		-----			
-----		-----			

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid
-----	-----		
-----	-----		
-----	-----		
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Education Tuition and Fees	
Attach all Form 1098-Ts and a list of your qualified education expenses.	
Student Loan Interest Paid	
Enter total 2011 qualified student loan interest	

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name

2010 Amount

_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name

2010 Amount

_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits

Taxpayer

Spouse

Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____
Medicare B premiums withheld	_____	_____
Medicare D premiums withheld	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income

1099-MISC Payer Name

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name

2010 Amount

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name

2010 Amount

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

Taxpayer

Spouse

Traditional IRA contributions made for 2011	_____	_____
Roth IRA contributions made for 2011	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

Medical and Dental Expenses	2011 Amount	2010 Amount
Prescription medications	_____	_____
Health insurance premiums	_____	_____
Doctors, dentists, etc	_____	_____
Hospitals, clinics, etc	_____	_____
Eyeglasses and contact lenses	_____	_____
Miles driven for medical purposes:		
From 01/01/11 thru 06/30/11	_____	_____
From 07/01/11 thru 12/31/11	_____	_____
Other medical and dental expenses:		
_____	_____	_____

Taxes	2011 Amount	2010 Amount
Real estate taxes paid on principal residence	_____	_____
Real estate taxes paid on additional homes or land	_____	_____
Auto license registration fees based on the value of the vehicle	_____	_____
Other personal property taxes	_____	_____

Interest Expenses	2011 Amount	2010 Amount
Home mortgage interest paid — Attach Form(s) 1098.		
Lender's Name		
_____	_____	_____
_____	_____	_____
Points paid on loan to buy, build or improve main home		
Lender's Name		
_____	_____	_____

Cash/Check/Credit Contributions	2011 Amount	2010 Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

Noncash Charitable Contributions	2011 Amount	2010 Amount
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.		

Miscellaneous Deductions	2011 Amount	2010 Amount
Union and professional dues	_____	_____
Professional subscriptions, books, supplies	_____	_____
Uniforms and protective clothing (including cleaning)	_____	_____
Job search costs	_____	_____
Taxpayer educator expenses	_____	_____
Spouse educator expenses	_____	_____
Tax return preparation fees	_____	_____
Safe deposit box rental	_____	_____
Gambling losses (to the extent of gambling income)	_____	_____
Other expenses (list):		
_____	_____	_____

	Yes	No
1 Did a lender cancel any of your debt in 2011? (Attach any Forms 1099-A or 1099-C)	<input type="checkbox"/>	<input type="checkbox"/>
2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2011? If yes , please attach details	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you purchase a motor vehicle or boat during 2011?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , attach documentation showing sales tax paid.		
4 Did you purchase a hybrid or electric vehicle in 2011? If yes , enter year, make, model, and date purchased:	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you donate a vehicle in 2011? If yes , attach Form 1098C	<input type="checkbox"/>	<input type="checkbox"/>
6 What was the sales tax rate in your locality in 2011? % State ID		
7 Did your marital status change during 2011?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , explain:		
8 Were you or your spouse permanently and totally disabled in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you have dependents who must file?	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$1900?	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you provide over half the support for any other person during 2011?	<input type="checkbox"/>	<input type="checkbox"/>
12 Did you incur adoption expenses during 2011?	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you receive any disability payments in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input type="checkbox"/>
16a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2011? If yes , attach closing or escrow statements, 1099-C or 1099-A forms.	<input type="checkbox"/>	<input type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you incur any casualty or theft losses during 2011?	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you incur any non-business bad debts?	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you pay any individual for domestic services in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you buy or sell any stocks or bonds in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? ..	<input type="checkbox"/>	<input type="checkbox"/>
22 Did you incur any moving expenses? If yes , attach details	<input type="checkbox"/>	<input type="checkbox"/>
23 Did you or your spouse elect continuation of COBRA coverage after your employment was involuntary terminated?	<input type="checkbox"/>	<input type="checkbox"/>
24 Did you receive any income not included in this Tax Organizer?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please attach information.		
25 Do you expect your income and deductions in 2012 to be the same as 2011?	<input type="checkbox"/>	<input type="checkbox"/>
If no , attach explanation of changes expected.		
26 If you paid any alimony, enter recipient's SSN: Alimony paid:		
27 Enter your state of residence Taxpayer Spouse		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	<input type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please provide a voided check (not a deposit slip) if your bank account information has changed.		
What type of account is this?	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)
