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2011 New Client Tax Organizer

Prepared by:

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This Tax Organizer is designed to help you collect and report the information needed to prepare your 2011 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2011 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

Please provide the following information:

- ☐ A copy of your 2010 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC or Form 1099-R.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ All other information notices you received, or any items you have questions about. Thank you for taking the time to complete this Tax Organizer.

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2011
TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last Name		Last Name	
First Name		First Name	
Middle Initial	Suffix	Middle Initial	Suffix
Social Security Number ...		Social Security Number ...	
Date of Birth		Date of Birth	
Email Address................		Email Address................	
Contact Phone Number...		Contact Phone Number...	

Address......................... ______ Apt # ______

City .... ______ State ______ Zip ______

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

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	2011 Amount

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

1099-R Payer Name	2011 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	2011 Amount

Attach Form(s) 1099-DIV ▾ Dividend Income

1099-DIV Payer Name	2011 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
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
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

Home mortgage interest paid ▾ Attach Form(s) 1098.

Lender's Name	2011 Amount

Points paid on loan to buy, build or improve main home

Lender's Name	2011 Amount

Cash/Check/Credit Contributions

	2011 Amount	

Noncash Charitable Contributions

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	
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):		

2011 Questions

		Yes	No
1	Did a lender cancel any of your debt in 2011? (Attach any Forms 1099-A or 1099-C)	☐	☐
2	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2011? If **yes,** please attach details	☐	☐
3	Did you purchase a motor vehicle or boat during 2011? 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: ________	☐	☐
5	Did you donate a vehicle in 2011? If **yes,** attach Form 1098C	☐	☐
6	What was the sales tax rate in your locality in 2011? ______% State ID ______		
7	Did your marital status change during 2011? If **yes,** explain: ________	☐	☐
8	Were you or your spouse permanently and totally disabled in 2011?	☐	☐
9	Do you have dependents who must file?	☐	☐
10	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $1900?	☐	☐
11	Did you provide over half the support for any other person during 2011?	☐	☐
12	Did you incur adoption expenses during 2011?	☐	☐
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?	☐	☐
14	Did you receive any disability payments in 2011?	☐	☐
15	Did you receive tip income **not** reported to your employer?	☐	☐
16 a	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.	☐	☐
b	If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?	☐	☐
17	Did you incur any casualty or theft losses during 2011?	☐	☐
18	Did you incur any non-business bad debts?	☐	☐
19	Did you pay any individual for domestic services in 2011?	☐	☐
20	Did you buy or sell any stocks or bonds in 2011?	☐	☐
21	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
22	Did you incur any moving expenses? If **yes,** attach details	☐	☐
23	Did you or your spouse elect continuation of COBRA coverage after your employment was involuntary terminated?	☐	☐
24	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
25	Do you expect your income and deductions in 2012 to be the same as 2011? 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?	☐	☐
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

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 ☐ Savings ☐

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.)