2011 | 1040 | US | Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2011,
please check the appropriate box and provide additional information if necessary.

Yes	No	
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Could you be claimed as a dependent on another person's tax return?
☐	☐	Were there any changes in dependents?
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you receive any disability income?
☐	☐	Did you buy or sell any stocks, bonds or other investment property?
☐	☐	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
☐	☐	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?
☐	☐	Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?
☐	☐	Did you transfer or rollover any amount from one retirement plan to another retirement plan?
☐	☐	Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2011?
☐	☐	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
☐	☐	Did you incur a loss because of damaged or stolen property?
☐	☐	Did you use your car on the job (other than to and from work)?
☐	☐	Do you want to electronically file your tax return?
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	Was your home rented out or used for business?
☐	☐	Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
☐	☐	Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2011?

2011	1040	US	Tax Organizer

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Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2011 tax return. Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

CLIENT INFORMATION

	Taxpayer	Spouse
First name and initial.......		
Last name........................		
Title/suffix........................		
Social security number....		
Occupation......................		
Date of birth (m/d/y)........		
Date of death (m/d/y)......		
1=blind............................		
Home phone....................		
Work phone.....................		
Work extension................		
Cell phone........................		
E-mail address................		

Address	In care of.....................	
	Street address............	
	Apartment number......	
	City..............................	
	State........................	
	ZIP code.....................	

DEPENDENTS

	Dependent No.	Dependent No.
First name........................		
Last name........................		
Title/suffix........................		
Date of birth (m/d/y)........		
Social security number....		
Relationship.....................		
Months lived at home......		

WAGES, SALARIES AND TIPS

Employer Name:	2011 Amount	2010 Amount
☐ ____________________	Attach Forms W-2	
☐ ____________________		

INTEREST INCOME

Payer Name:		
☐ ____________________	Attach Forms 1099-INT	
☐ ____________________		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

DIVIDEND INCOME

Payer Name:

		2011 Amount	2010 Amount
☐		Attach Forms 1099-DIV	
☐			

PENSION AND IRA INCOME

Payer name:

		2011 Amount	2010 Amount
☐		Attach Forms 1099-R	
☐			

GAMBLING WINNINGS

Payer name:

		2011 Amount	2010 Amount
☐		Attach Forms W-2G	
☐			
	Total gambling losses		
	Winnings not reported on Form W-2G		

OTHER GOVERNMENT FORMS - INCOME

		2011 Amount	2010 Amount
☐	Form 1099-B - Sales of stock (also include transaction history)	Attach Forms 1099	
☐	Form 1099-MISC - Miscellaneous income		
☐	Form 1099-K - Merchant card and third party network payments		
☐	Form 1099-S - Sales of real estate (also include closing statements)		
☐	Form 1099-G - State tax refunds	Attach Forms 1099	

Taxpayer:

		2011 Amount	2010 Amount
☐	Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐	Form 1099-G - Unemployment compensation		

Spouse:

		2011 Amount	2010 Amount
☐	Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐	Form 1099-G - Unemployment compensation		

MISCELLANEOUS INCOME

	2011 Amount	2010 Amount
Alimony received		
Spouse: Alimony received		

Other:

	2011 Amount	2010 Amount

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer:

	2011 Amount	2010 Amount
Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

RETIREMENT PLAN CONTRIBUTIONS (Continued)

Spouse:	2011 Amount	2010 Amount
Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)		

OTHER GOVERNMENT FORMS - DEDUCTIONS

		2011 Amount	2010 Amount
☐	Form 1098-E - Student loan interest	Attach Forms 1098	
☐	Form 1098-T - Tuition and related expenses		

ADJUSTMENTS TO INCOME

	2011 Amount	2010 Amount
Taxpayer:		
Self-employed health insurance premiums		
Educator expenses		
Expenses from rental of personal property		
Other adjustments to income:		
Alimony Paid - Recipient name & SSN		
Spouse:		
Self-employed health insurance premiums		
Educator expenses		
Expenses from rental of personal property		
Other adjustments to income:		
Alimony Paid - Recipient name & SSN		

MEDICAL AND DENTAL EXPENSES

	2011 Amount	2010 Amount
Prescription medicines and drugs		
Doctors, dentists and nurses		
Hospitals and nursing homes		
Insurance premiums		
Taxpayer: Long-term care premiums		
Spouse: Long-term care premiums		
Insurance reimbursements		
Out-of-pocket lodging and transportation expenses		
Number of medical miles		
Other:		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

TAXES PAID

	2011 Amount	2010 Amount
State income taxes - 1/11 payment on 2010 state estimate....................		
State income taxes - paid with 2010 state extension...............................		
State income taxes - paid with 2010 state return.....................................		
State income taxes - paid for prior years and/or to other states.............		
City/local income taxes - 1/11 payment on 2010 city/local estimate........		
City/local income taxes - paid with 2010 city/local extension..................		
City/local income taxes - paid with 2010 city/local return........................		
State and local sales taxes paid (except autos and special items)...........		
Use taxes paid on 2011 purchases...		
Use taxes paid on 2010 state return..		
Sales tax on autos not included above..		
Sales taxes paid on boats, aircraft and other special items......................		
Real estate taxes - principal residence..		
Real estate taxes - property held for investment......................................		
Foreign income taxes..		
Other:		
______		
______		
☐ Personal property taxes (including automobile fees in some states)........	Attach Tax Notice	

INTEREST PAID

	2011 Amount	2010 Amount
Home mortgage interest and points paid		
☐ ______	Attach Forms 1098	
☐ ______		
Home mortgage interest not on Form 1098 (include name, SSN, & address of payee)		
______		
______		
Points not reported on Form 1098		
______		
______		
Mortgage insurance premiums on post 12/31/06 contracts....................		
Investment interest (interest on margin accounts):		
______		
______		
Passive Interest...		

CASH CONTRIBUTIONS

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

	2011 Amount	2010 Amount
______		
______		
Volunteer Expenses (out-of-pocket)...		
Number of charitable miles..		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better.
In addition, a deduction for any item with minimal monetary value may be denied.

	2011 Amount	2010 Amount

MISCELLANEOUS DEDUCTIONS

	2011 Amount	2010 Amount
Union and professional dues		
Tax return preparation fee		
Safe deposit box rental		
Investment expenses		
Estate tax, section 691(c)		
Unreimbursed employee expenses:		
Other:		