

Taxpayer Information		Spouse Information	
Last name . . . . .	_____	Last name . . . . .	_____
First name . . . . .	_____	First name . . . . .	_____
Middle Initial . . . . .	_____	Middle Initial . . . . .	_____
Suffix . . . . .	_____	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	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense
Last name	Suffix	Relationship			
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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 . . . . .	_____	_____

<b>Medical and Dental Expenses</b>	<b>2011 Amount</b>	<b>2010 Amount</b>
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:	_____	_____
_____	_____	_____
<b>Taxes</b>	<b>2011 Amount</b>	<b>2010 Amount</b>
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. . . . .	_____	_____
<b>Interest Expenses</b>		
Home mortgage interest paid — Attach Form(s) 1098.		
<b>Lender's Name</b>	<b>2011 Amount</b>	<b>2010 Amount</b>
_____	_____	_____
_____	_____	_____
Points paid on loan to buy, build or improve main home		
<b>Lender's Name</b>	<b>2011 Amount</b>	
_____	_____	
<b>Cash/Check/Credit Contributions</b>	<b>2011 Amount</b>	<b>2010 Amount</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____
<b>Noncash Charitable Contributions</b>		
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.		
<b>Miscellaneous Deductions</b>	<b>2011 Amount</b>	<b>2010 Amount</b>
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 <b>yes</b> , please attach details . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
3	Did you purchase a motor vehicle or boat during 2011? . . . . . If <b>yes</b> , attach documentation showing sales tax paid.	<input type="checkbox"/>	<input type="checkbox"/>
4	Did you purchase a hybrid or electric vehicle in 2011? If <b>yes</b> , enter year, make, model, and date purchased: _____	<input type="checkbox"/>	<input type="checkbox"/>
5	Did you donate a vehicle in 2011? If <b>yes</b> , 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? . . . . . If <b>yes</b> , explain: _____	<input type="checkbox"/>	<input type="checkbox"/>
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 <b>not</b> reported to your employer? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
16 a	Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2011? If <b>yes</b> , 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 <b>yes</b> , 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? . . . . . If <b>yes</b> , please attach information.	<input type="checkbox"/>	<input type="checkbox"/>
25	Do you expect your income and deductions in 2012 to be the same as 2011? . . . . . If <b>no</b> , attach explanation of changes expected.	<input type="checkbox"/>	<input type="checkbox"/>
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? . . . . .  Yes  No

The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.  
If you receive a refund, would you like direct deposit? . . . . .  Yes  No

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.)

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\_\_\_\_\_

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