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Tax Organizer 2011

For questions left blank or unanswered I will assume the answer is "No".

Information needed for your tax return:

Last year's tax return, if I didn't prepare it.

Name (as on social security card)

Address

Phone

Email

Social Security number

Date of birth

If you were married as of Dec. 31, 2011, would you like to file jointly?

If so, spouse's:

Name (as on social security card)

Social Security number

Date of birth

Phone

Email

Are you registered as domestic partners in Washington, California, or Nevada?

Do you have any dependent children who live with you?

Name Date of birth Social Security Number

Did you have child care expenses?

Did you have adoption expenses?

Do you have any other dependents?

Name Date of birth Social Security Number Relationship to you

Do you want to donate \$3 to the Presidential Election Fund?

Did you get any letters or notices from the IRS last year?

**Did you make any estimated tax payments for 2011,
or have any of your 2010 refund applied to your 2011 taxes?**

INCOME

W-2s from employers

1099-INTs and any other interest received

1099-DIVs and any other dividends received

1099-Rs and any other retirement or pension income received

Did you take an early distribution (before age 59 1/2)?

SSA-1099 Social Security benefits

1099-Bs and any broker statements

Did you sell any stocks or investment property?

Did you buy or sell a house or other real estate?

If so, please include the settlement statement

Was it your residence, or rental, or investment property?

Did you have any rental income?

W-2G Gambling winnings

Did you have any gambling losses?

1099-G Unemployment compensation or other government payments

K-1s from partnerships, trusts or estates

Did you receive any other income not listed above?

Did you earn any income working in a different state?

Did you earn any income working outside of the United States?

If you're not a US citizen, what is your status?

If you received a 1099-MISC or had any self-employment (freelance) income,
please see the page "**Schedule C Self-employment**"

DEDUCTIONS & CREDITS

1098-T Tuition expense

1098-E Student loan interest

Did you contribute to an IRA or other retirement plan?

Did you move?

Where from?

When?

Was the move work-related?

Did you have K-12 teaching expenses?

Did you receive or pay alimony?

Did you make energy-efficient home improvements?

Did you take the homebuyer's credit in 2008?

Did you do a Roth IRA conversion in 2010?

Any other information or questions

Did you have any bank accounts or financial investments outside of the US?

All the information provided is complete and correct to the best of my knowledge, and I have appropriate documentation for all items claimed.

(please sign and date)

Schedule A Itemized Deductions

Did you have medical expenses not reimbursed by insurance?

Health insurance premiums?

Doctor, dentist, eye doctor, physical therapy, or other medical professionals?

Prescription medications?

Medical equipment or supplies?

1098 Mortgage interest or other mortgage interest paid

Did you purchase a house or any real estate?
If so, please attach copy of settlement statement

Real estate taxes

Sales tax on vehicles or home improvements

Did you make any charitable contributions?
Please list the amounts and charities

Do you have a receipt from the organization or other documentation?

Did you donate any items to charity?
Please list the charity, the items donated and their estimated garage sale or EBay value

Do you have a receipt from the organization or other documentation?

Did you have unreimbursed employee expenses?

Job search expenses?

Tax preparation expenses?

Safe deposit box fees?

Investment interest?

Did you have a disaster or theft loss not covered by insurance?

Schedule C Self-employment

Are you self-employed - do you have your own business as a sole proprietor?

What kind of business is it?

Is there a business name (other than your own)?

Do you have an EIN?

Address of business (if different than home)

Cash basis?

Calendar year?

Is this your first year in business?

Did you pay any health insurance premiums?

Did you contribute to a self-employed retirement plan?

Did you have employees?

Income:

Revenue received in 2011

Was it all earned in your state of residence?

If not, how much was earned in each state?

Did you receive any 1099 –MISC forms?

If you have **inventory**, how much did you have at the beginning of the year?

End of the year?

Amount of purchases during the year?

You can provide a copy of your QuickBooks or access to your Xero or other accounting software, or a printout or Excel spreadsheet of your expenses if available.

Expenses:

Advertising & Marketing

Website & Internet

Computer & software expense

Office supplies

Supplies used in your business

Bank fees, PayPal & merchant fees

Independent contractors

Did you issue 1099-MISCs?

Lawyers, accountants & other professionals

Rent

Professional education

Postage & freight

Dues & memberships

Books & publications

Business insurance

Interest paid on business loans or business credit cards

Taxes & licenses

Business telephone expenses

Business travel

Business meals - please list 100% of the amount you paid

Do you have documentation showing the business purpose of the meals?

Please provide a list of all your other business expenses.

Each business is different and you may have expenses not listed above.

Does your business own furniture, equipment, computers, or other assets?

Please provide a list.

If you have **business mileage**, how many miles did you drive for business

January through June?

July through December?

How many total miles did you drive all year?

Do you have documentation written at the time showing the business purpose for each trip?

If you have a **home office**, what is the square footage of the office?

What is the square footage of your whole residence?

What were your utility costs for the year?

Did you have homeowner's or renter's insurance?

If you rent, how much rent did you pay?

If you own your home, how much mortgage interest did you pay?

How much real estate tax did you pay?

How much was the purchase price of the home?