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## 2011 TAX ORGANIZER

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I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks or other documents. This information is true, correct and complete to the best of my (our) knowledge.

Taxpayer Signature	Date
Spouse Signature	Date



For any question answered Yes, please attach supporting detail or documents.

Personal Information:

- Did your marital status change during 2011?  Yes  No
- If married, do you and your spouse want to file separate returns?  Yes  No
- Did your address change during 2011?  Yes  No
- Can you or your spouse be claimed as a dependent by another taxpayer?  Yes  No

Dependents:

- Were there any changes in dependents from the prior year?  Yes  No  
Note: Include non-child dependents for whom you provided more than half the support
- Did you pay for child care while you worked or looked for work?  Yes  No
- Do you have any children under age 18 with unearned income more than \$950?  Yes  No
- Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than \$950?  Yes  No
- Did you adopt a child or begin adoption proceedings during 2011?  Yes  No

Purchases, Sales and Debt:

- Did you have any debts canceled, forgiven or refinanced during 2011?  Yes  No
- Did you start a new business, purchase a new rental property, farm or acquire any new interest in any partnership or S corporation during 2011?  Yes  No
- Did you sell an existing business, rental property, farm or any existing interest in a partnership or S corporation during 2011?  Yes  No
- Did you sell, exchange or purchase any real estate in 2011? If so, please attach closing statements.  Yes  No
- Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?  Yes  No
- Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan?  Yes  No
- Did you pay any student loan interest in 2011?  Yes  No
- Are your total mortgages on your first and/or second residence greater than \$1,000,000? If so, please provide the principal balance and interest rate at the beginning and the end of the year.  Yes  No
- Did you have an outstanding home equity loan at the end of 2011? If so, please provide the principal balance and interest rate at the beginning and end of the year.  Yes  No
- Did you take out a home equity loan in 2011?  Yes  No
- Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?  Yes  No
- Did you or your mortgagee receive any mortgage assistance payments? If Yes, enclose and Forms 1098-MA.  Yes  No





Miscellaneous: (continued)

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you received a punitive damage award or an award for damages other than for physical injuries or illness? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| Were you notified by the IRS or other taxing authority of any changes in prior year returns? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you lose your job during 2011 because of foreign competition and pay for your own health insurance? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you been an identity theft victim and have you contacted the IRS? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| If Yes, please furnish the 6-digit identity protection PIN issued to you by the IRS .....  |                          | _____                    |
| Did you engage in any bartering transactions? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any work outside of the U.S. or pay any foreign taxes? .....  | <input type="checkbox"/> | <input type="checkbox"/> |

Gifts:

- |  |                          |                          |
|--|--------------------------|--------------------------|
| Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc., with a total (aggregate) value in excess of \$13,000 to any individual during the year? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you or your spouse make any gifts to a trust for any amount during the year? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you or your spouse have a life insurance trust? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you assist in the purchase of any asset (auto, home) for any individual during the year? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you forgive any indebtedness to any individual, trust or entity during the year? .....   | <input type="checkbox"/> | <input type="checkbox"/> |

If you answered Yes to any of the above gift questions, please complete Form 34 and/or 35 in the back of the Organizer.

Severance/Retirement:

- |   |                          |                          |
|---|--------------------------|--------------------------|
| Did you retire or change jobs in 2011? .....                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive deferred, retirement or severance compensation? ..... | <input type="checkbox"/> | <input type="checkbox"/> |

If Yes, enter the date received (Mo/Da/Yr).

Date

- |  |                          |                          |
|--|--------------------------|--------------------------|
| Did you or your spouse turn age 70 1/2 during the year and have money in an IRA or other retirement account while not taking any distribution? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|



# Personal Information

**Taxpayer:**

First Name and Initial	Last Name	Social Security Number
Occupation	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)

**Spouse:**

First Name and Initial	Last Name	Social Security Number
Occupation	Date of Birth (Mo/Da/Yr)	Date of Death (Mo/Da/Yr)

**Contact Information:**

Street Address	Apartment Number
City	State
Province or County	ZIP or Postal Code
Foreign Country	
Taxpayer Daytime/Work Phone	Spouse Daytime/Work Phone
Taxpayer Evening/Home Phone	Spouse Evening/Home Phone
Taxpayer Cell Phone	Spouse Cell Phone
Taxpayer Fax Number	Spouse Fax Number
Taxpayer Email Address	
Spouse Email Address	
Preferred Method of Contact	

May the IRS or other taxing authority discuss the return with the preparer? .....

Is the taxpayer claimed as a dependent on someone else's tax return? .....

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Are you considered legally blind per IRS regulations? .....

Do you want to contribute to the Presidential Election Campaign Fund? .....

Taxpayer		Spouse	
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# Electronic Filing

**Electronic Filing:** Please enclose all copies of your current year Forms W-2

Electronic filing is the means by which your return is transmitted directly to the IRS. Electronic filing is the only filing method that provides you with acknowledgement that the IRS has received your return and is processing it. If you are to receive a refund and use direct deposit with electronic filing, you will normally receive your refund in about 2 weeks.

Please note that not all returns qualify for electronic filing under IRS rules.

	Yes	No
If you qualify for electronic filing, would you like to file the return electronically with the IRS? .....	<input type="checkbox"/>	<input type="checkbox"/>
Would you like your return prepared and filed electronically when you have a balance due? .....	<input type="checkbox"/>	<input type="checkbox"/>
Would you like your federal return filed electronically only if your refund is greater than a certain minimum dollar amount? .....	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, enter the amount here. ....	<input style="width: 100px;" type="text"/>	
If you qualify, would you like to file your state return electronically? .....	<input type="checkbox"/>	<input type="checkbox"/>
If you file more than one state, do you want to file all of them electronically? .....	<input type="checkbox"/>	<input type="checkbox"/>

**The IRS requires the use of a 5-digit self-selected Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.**

Would you like to use a randomly generated PIN?	Yes	No
Taxpayer .....	<input type="checkbox"/>	<input type="checkbox"/>
Spouse .....	<input type="checkbox"/>	<input type="checkbox"/>
If No, please provide a 5-digit self-selected PIN:		
Taxpayer PIN .....	<input style="width: 100px;" type="text"/>	
Spouse PIN .....	<input style="width: 100px;" type="text"/>	



# Direct Deposit and Withdrawal

## Direct Deposit and Electronic Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited directly into your financial institution account, regardless of the means used to file the return. For balance due returns to be filed electronically, the IRS and many states allow the entire amount due to be paid using electronic withdrawal. If you would like to have your refund deposited directly into your account or pay a balance due by using an electronic withdrawal, please complete the following information.

(To properly file your return, please attach a voided check or a copy of a monthly statement for your account.)

Owner of account .....  Taxpayer       Spouse       Joint

Select type of account .....  Checking       Trad. Savings       IRA Savings       HSA Savings  
 Archer MSA Savings       Coverdell Ed.Savings

Name of financial institution .....

Financial Institution Routing Transit Number (if known) .....

(Use the routing number from a check, NOT a deposit slip. They can be different.

The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number .....

Is this a business account? .....

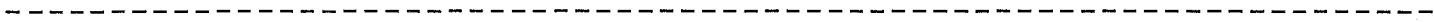
Do you want your refund deposited directly into your financial institution account? .....

If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal? .....

What amount do you want withdrawn if not the entire balance due? .....

What date do you want the withdrawal done? ..... (Mo/Da/Yr)

Yes	No



Owner of account .....  Taxpayer       Spouse       Joint

Select type of account .....  Checking       Trad. Savings       IRA Savings       HSA Savings  
 Archer MSA Savings       Coverdell Ed.Savings

Name of financial institution .....

Financial Institution Routing Transit Number (if known) .....

(Use the routing number from a check, NOT a deposit slip. They can be different.

The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number .....

Is this a business account? .....

Do you want your refund deposited directly into your financial institution account? .....

If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal? .....

What amount do you want withdrawn if not the entire balance due? .....

What date do you want the withdrawal done? ..... (Mo/Da/Yr)

Yes	No



# 2011 Tax Return Checklist

Client Name: \_\_\_\_\_

	Prior Year	Current Year
<b>Income:</b>		
Wages (IRS W-2) .....	_____	_____
Interest Income (IRS 1099-INT) .....	_____	_____
Dividend Income (IRS 1099-DIV) .....	_____	_____
Brokerage Statements (Form 1099-A,B,S) .....	_____	_____
IRA/Pension/Annuity Income (IRS 1099R) .....	_____	_____
Schedule K-1s (IRS K-1) .....	_____	_____
Miscellaneous Income (IRS-1099-MISC, G) .....	_____	_____
<b>Itemized Deductions:</b>		
Medical/Dental Expenses .....	_____	_____
Real Estate Taxes .....	_____	_____
Property Taxes .....	_____	_____
Mortgage Interest (Form 1098) .....	_____	_____
Charitable Contributions .....	_____	_____
<b>Other:</b>		
Estimated Tax Payments .....	_____	_____

\* Please provide any tax related information not listed above, e.g. new brokerage statements, K-1 investments, etc.