

2011 -- Miscellaneous Information

Taxpayer: _____

SSN: _____

Yes	No	General Information
		Were there any changes to your filing status or number of dependents during 2011?
		Can you or your spouse be claimed as a dependent by someone else?
		Did you incur any childcare expenses?
		Did you have a change in your mailing address or job description during the year?

Yes	No	Income Information
		Have you received all W-2s from all employers? How many W-2s are attached? _____
		Did you receive any disability income during the year? \$ _____ Attach 1099-R
		Did you have an interest in or signature over a bank or brokerage account in a foreign country? Were you a grantor of or transferor to a foreign country?
		Did you earn interest from, or are you an authorized signature holder on, a foreign bank account?
		Did you have any income from, or pay taxes to, a foreign country?
		Did you surrender any US Savings Bonds during 2011?
		Did you receive a Schedule K-1 from a partnership, S corporation, or trust? If so, please attach.
		Did you receive any type of prize, award, or gambling winnings during 2011?
		Did you receive any of the following: Unemployment income, Combat pay, Jury Duty and/or Alimony, or Maintenance Received? If so, what and how much? _____
		Did you receive any income not shown in this organizer? If so, please list: _____

Yes	No	Business Information
		Did you start a new business or purchase any rental property during 2011?
		Have you purchased any business assets (furniture, equipment, etc.) or converted any assets to business use? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, business use percentage, etc.
		Did you dispose of any business assets (including real estate)? If yes, please list on an attached sheet the date removed from service, selling price and expense of sale.
		Did you own rental property? What percentage of time did you spend managing your rentals? _____

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Yes	No	Other Information
<input type="checkbox"/>	<input type="checkbox"/>	Were there any tuition costs paid during 2011 (even if classes for attended in another year)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase a home for your personal residence between April 8, 2008 and December 31, 2008?
<input type="checkbox"/>	<input type="checkbox"/>	If yes, was the First-Time Homebuyer Credit taken on the home?
<input type="checkbox"/>	<input type="checkbox"/>	Did you make any gifts to any one person in 2011 in excess of \$13,000? If so, are you splitting this gift with your spouse?
<input type="checkbox"/>	<input type="checkbox"/>	

To itemize deductions, bring receipts and documentation for these types of expenses:

<input type="checkbox"/>	Prescriptions, first-aid
<input type="checkbox"/>	State/local income taxes
<input type="checkbox"/>	Mortgage Interest
<input type="checkbox"/>	Tax preparation fees
<input type="checkbox"/>	Cash donations to charity (provide all receipts)
<input type="checkbox"/>	Medical/Dental/Vision expenses and insurance premiums, mileage and lodging for seeking medical (excluding meals)
<input type="checkbox"/>	Real estate and personal property taxes paid in 2011
<input type="checkbox"/>	Fair market value of property donated to charity

Information to bring to your appointment:

<input type="checkbox"/>	Driver's license & social security card (for identity verification)
<input type="checkbox"/>	New clients need a copy of your 2010 income tax return (for comparison and review for all includable information)
<input type="checkbox"/>	Original W-2s and other statements of income received from employers
<input type="checkbox"/>	1099s and other statements of income received from employers
<input type="checkbox"/>	Canceled checking/savings slip (for direct deposit/direct debit information)