

General: 1040

**Personal Information**

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) \_\_\_\_\_

Mark if you were married but living apart all year \_\_\_\_\_ Mark if your nonresident alien spouse does not have an ITIN \_\_\_\_\_

**Taxpayer** **Spouse**

Social security number \_\_\_\_\_

First name \_\_\_\_\_

Last name \_\_\_\_\_

Occupation \_\_\_\_\_

Designate \$3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank) \_\_\_\_\_

Mark if legally blind \_\_\_\_\_

Mark if dependent of another taxpayer \_\_\_\_\_

Taxpayer between 19 and 23, full-time student, with income less than 1/2 support? (Y, N) \_\_\_\_\_

Date of birth \_\_\_\_\_

Date of death \_\_\_\_\_

Work/daytime telephone number/ext number \_\_\_\_\_

Do you authorize us to discuss your return with the IRS (Y, N) \_\_\_\_\_

General: 1040, Contact

**Present Mailing Address**

Address \_\_\_\_\_

Apartment number \_\_\_\_\_

City/State postal code/Zip code \_\_\_\_\_

Foreign country name \_\_\_\_\_

Home/evening telephone number \_\_\_\_\_

Taxpayer email address \_\_\_\_\_

Spouse email address \_\_\_\_\_

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**Dependent Information**

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months in home	Care expenses paid for dependent
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Credits: 2441

**Child and Dependent Care Expenses**

Provider information:	Provider #1	Provider #2
Name	_____	_____
Street address	_____	_____
City, state, and zip code	_____	_____
Social security number OR Employer identification number	_____	_____
Tax Exempt or Living Abroad Foreign Care Provider (1 = TE, 2 = LAFCP)	_____	_____
Amount paid to care provider in 2011	_____	_____
	<b>Taxpayer</b>	<b>Spouse</b>

Employer-provided dependent care benefits that were forfeited \_\_\_\_\_

General: Info

**Direct Deposit/Electronic Funds Withdrawal Information**

If you would like to have a refund deposited directly or a balance due debited directly into/from your bank account, please enter the following information:

Financial institution: Routing transit number \_\_\_\_\_ Name \_\_\_\_\_

Your account number \_\_\_\_\_ Type of account (1 = Savings, 2 = Checking, 3 = IRA\*) \_\_\_\_\_

If you would like to use a refund to purchase U.S. Series I Savings bonds (in increments of \$50), enter a maximum amount up to \$5,000.\*\* \_\_\_\_\_

\*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

\*\*To purchase U.S. Series I Savings bonds in someone else's name, please contact our office.

## Questions

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
<b>Personal Information</b>		
Did your marital status change during the year?	✓	✓
If yes, explain: _____		
Did your address change from last year?	✓	✓
Can you be claimed as a dependent by another taxpayer?	✓	✓
Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	✓	✓
<b>Dependent Information</b>		
Were there any changes in dependents from the prior year?	✓	✓
If yes, explain: _____		
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$1900?	✓	✓
Do you have dependents who must file a tax return?	✓	✓
Did you provide over half the support for any other person(s) during the year?	✓	✓
Did you pay for child care while you worked or looked for work?	✓	✓
Did you pay any expenses related to the adoption of a child during the year?	✓	✓
If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	✓	✓
<b>Purchases, Sales and Debt Information</b>		
Did you start a new business or purchase rental property during the year?	✓	✓
Did you acquire a new or additional interest in a partnership or S corporation?	✓	✓
Did you sell, exchange, or purchase any real estate during the year?	✓	✓
Did you purchase or sell a principal residence during the year?	✓	✓
Did you foreclose or abandon a principal residence or real property during the year?	✓	✓
Did you acquire or dispose of any stock during the year?	✓	✓
Did you take out a home equity loan this year?	✓	✓
Did you refinance a principal residence or second home this year?	✓	✓
Did you sell an existing business, rental, or other property this year?	✓	✓
Did you incur any non-business bad debts this year?	✓	✓
Did you have any debts canceled or forgiven this year?	✓	✓
Did you purchase a new hybrid, alternative motor, or electric motor energy efficient vehicle this year?	✓	✓
Did you pay any student loan interest this year?	✓	✓
<b>Income Information</b>		
Did you have any foreign income or pay any foreign taxes during the year?	✓	✓
Did you receive any income from property sold prior to this year?	✓	✓
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	✓	✓
Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401k, or other qualified retirement plan?	✓	✓
Did you make any withdrawals from an education savings or 529 Plan account?	✓	✓
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?	✓	✓
Did you receive any Social Security benefits during the year?	✓	✓
Did you receive any unemployment benefits during the year?	✓	✓
Did you receive any disability income during the year?	✓	✓
Did you receive tip income not reported to your employer this year?	✓	✓
Did any of your life insurance policies mature, or did you surrender any policies?	✓	✓

Did you cash any Series EE or I U.S. Savings bonds issued after 1989?      ✓      ✓

**Itemized Deduction Information**

Did you incur a casualty or theft loss during the year?      ✓      ✓  
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?      ✓      ✓  
Do you have evidence to substantiate charitable contributions?      ✓      ✓  
Did you make any noncash charitable contributions (clothes, furniture, etc.)?      ✓      ✓  
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C.      ✓      ✓  
Did you have an expense account or allowance during the year?      ✓      ✓  
Did you use your car on the job, for other than commuting?      ✓      ✓  
Did you work out of town for part of the year?      ✓      ✓  
Did you have any expenses related to seeking a new job during the year?      ✓      ✓  
Did you make any major purchases during the year (cars, boats, etc.)?      ✓      ✓  
Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?      ✓      ✓

**Miscellaneous Information**

Did you make gifts of more than \$13,000 to any individual?      ✓      ✓  
Did you have any educational expenses during the year?      ✓      ✓  
Did you make any contributions to an education savings or 529 Plan account?      ✓      ✓  
Did you make any contributions to a Health savings account (HSA) or Archer MSA?      ✓      ✓  
Did you pay long-term health care premiums for yourself or your family?      ✓      ✓  
Did you pay any COBRA health care coverage continuation premiums?      ✓      ✓  
Are you a business owner and have paid health insurance premiums for your employees this year?      ✓      ✓  
Did you utilize an area of your home for business purposes?      ✓      ✓  
Did you engage in any bartering transactions?      ✓      ✓  
Are you an active participant in a pension or retirement plan?      ✓      ✓  
Did you retire or change jobs this year?      ✓      ✓  
Did you incur moving costs because of a job change?      ✓      ✓  
Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?      ✓      ✓  
Did you pay any individual as a household employee during the year?      ✓      ✓  
Did you make energy efficient improvements to your main home this year?      ✓      ✓  
Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?      ✓      ✓  
Did you receive correspondence from the State or the Internal Revenue Service?      ✓      ✓  
If yes, explain: \_\_\_\_\_  
Do you want to designate \$3 to the Presidential Election Campaign Fund?      ✓      ✓  
If you check yes, it will not change your tax or reduce your refund.  
Did you pay state and local real estate property taxes this year? If yes, please attach a supporting statement.      ✓      ✓

Income: W2

### Salary and Wages

Please provide all copies of Form W-2 that you receive.

Below is a list of the Form(s) W-2 as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: 1099R

### Pension, IRA, and Annuity Distributions

Please provide all copies of Form 1099-R that you receive.

Below is a list of the Form(s) 1099-R as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: K1, K1T

### Schedules K-1

Please provide all copies of Schedule K-1 that you receive.

Below is a list of the Schedule(s) K-1 as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box.

T/S/J	Description	Form	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Income: W2G

### Gambling Income

Please provide all copies of Form W-2G that you receive.

Below is a list of the Form(s) W-2G as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___
___	_____	_____	___

Educate: 1099Q

### Qualified Education Plan Distributions

Please provide all copies of Form 1099-Q that you receive.

Below is a list of the Form(s) 1099-Q as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable
___	_____	_____	___
___	_____	_____	___



Income: B1 **Interest Income**

Please provide all copies of Form 1099-INT.

T/S/J	Payer Name	Interest Income	Prior Year Information
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Income: B3 **Seller Financed Mortgage Interest**

T, S, J  Payer's name \_\_\_\_\_  
 Payer's address \_\_\_\_\_ Payer's social security number \_\_\_\_\_  
 Amount received in 2011 \_\_\_\_\_ Amount received in 2010 \_\_\_\_\_

Income: B2 **Dividend Income**

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Income: D **Sales of Stocks, Securities, and Other Investment Property**

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Income: Income **Other Income**

Please provide copies of all supporting documentation.

	2011 Information		Prior Year Information
	Taxpayer	Spouse	Prior Year Information
State and local income tax refunds	_____	_____	_____
Alimony received	_____	_____	_____
Unemployment compensation	_____	_____	_____
Unemployment compensation repaid	_____	_____	_____
Social security benefits	_____	_____	_____
Medicare premiums to be reported on Schedule A	_____	_____	_____
Railroad retirement benefits	_____	_____	_____

T/S/J	2011 Information	Prior Year Information
Other Income:	_____	_____
_____	_____	_____
_____	_____	_____

1040 Adj: IRA

### Adjustments to Income - IRA Contributions

Please provide year end statements for each account and any Form 8606 not prepared by this office.

Taxpayer

Spouse

**Traditional IRA Contributions for 2011 -**

If you want to contribute the maximum allowable traditional IRA contribution amount,

enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)

Enter the total traditional IRA contributions made for use in 2011

**Roth IRA Contributions for 2011 -**

Mark if you want to contribute the maximum Roth IRA contribution

Enter the total Roth IRA contributions made for use in 2011

Educate: Educate

### Higher Education Deductions and/or Credits

Complete this section if you paid interest on a qualified student loan in 2011 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2011 Information	Prior Year Information
____	_____	_____	_____
____	_____	_____	_____

Complete this section if you paid qualified education expenses for higher education costs in 2011.

Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.

Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information
____	__	_____	_____	_____	_____	_____
____	__	_____	_____	_____	_____	_____
____	__	_____	_____	_____	_____	_____
____	__	_____	_____	_____	_____	_____

\*Education Expense Code: 1 = American opportunity credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction

The student qualifies for the American opportunity credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 4 years of post-secondary education; has no felony drug convictions on student's record

1040 Adj: 3903

### Job Related Moving Expenses

Complete this section if you moved to a new home because of a new principal work place.

Description of move	_____
Taxpayer/Spouse/Joint (T, S, J)	_____
Mark if the move was due to service in the armed forces	_____
Number of miles from old home to new workplace	_____
Number of miles from old home to old workplace	_____
Mark if move is outside United States or its possessions	_____
Transportation and storage expenses	_____
Travel and lodging (not including meals)	_____
Total amount reimbursed for moving expenses	_____

1040 Adj: OtherAdj

### Other Adjustments to Income

Alimony Paid:

T/S	Recipient name	Recipient SSN	2011 Information	Prior Year Information
____	_____	_____	_____	_____
	Address _____	City _____	State _____	Zip code _____

	Taxpayer	Spouse	Prior Year Information
--	----------	--------	------------------------

Educator expenses:	_____	_____	_____
	_____	_____	_____

Other adjustments:	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

Itemized: A1

**Medical and Dental Expenses**

T/S/J		2011 Information	Prior Year Information
—	Medical and dental expenses	_____	_____
—	Medical insurance premiums you paid	_____	_____
—	Long-term care premiums you paid	_____	_____
—	Prescription medicines and drugs	_____	_____
—	Miles driven for medical items 1/1/11 through 6/30/11 _____ 7/1/11 through 12/31/11 _____	_____	_____

Itemized: A1

**Tax Expenses**

T/S/J		2011 Information	Prior Year Information
—	State/local income taxes paid	_____	_____
—	2010 state and local income taxes paid in 2011	_____	_____
—	Sales tax paid on actual expenses	_____	_____
—	Real estate taxes paid	_____	_____
—	Personal property taxes	_____	_____
—	Other taxes	_____	_____

Itemized: A2

**Interest Expenses**

T/S/J		2011 Information	Prior Year Information
—	Home mortgage interest: From Form 1098	_____	_____
Other, such as: Home mortgage interest paid to individuals			
T/S/J	Name	SSN	2011 Information
—	_____	_____	_____
Address _____			
T/S/J		2011 Information	Prior Year Information
—	Investment interest expense, other than on K-1s:	_____	_____
Refinancing Information:			
	Refinance #1		Refinance #2
T/S/J	Description	_____	_____
—	Total points paid	_____	_____
—	Date of refinance	_____	_____
—	Total number of payments	_____	_____
—	Reported on Form 1098 in 2011	_____	_____

Itemized: A3

**Charitable Contributions**

T/S/J		2011 Information	Prior Year Information
—	Contributions made by cash or check	_____	_____
—	Volunteer miles driven	_____	_____
—	Noncash items, such as: Goodwill, Salvation Army	_____	_____

Itemized: A3

**Miscellaneous Deductions**

T/S/J		2011 Information	Prior Year Information
—	Unreimbursed expenses	_____	_____
—	Union dues	_____	_____
—	Tax preparation fees	_____	_____
Other expenses, subject to 2% AGI limitation:			
—	_____	_____	_____
—	_____	_____	_____
—	Safe deposit box rental	_____	_____
Investment expenses, other than on K1s:			
—	Other expenses, not subject to the 2% AGI limitation:	_____	_____
—	_____	_____	_____
—	Gambling losses: (Enter only if you have gambling income)	_____	_____