



Education, experience and expertise you can trust.

Thank you for allowing us to prepare your tax return. **You are responsible for the information on your return so please provide complete and accurate information to the certified tax preparer.** If you have any questions please ask your preparer.

You will need your:

- Tax information such as Forms W-2, 1099, 1098.
- Social security cards or ITIN letters for you and all persons on your tax return.
- Proof of Identity (such as a valid drivers license or other government issued picture ID).

Part I. Your Personal Information

1. Your First Name	M. I.	Last Name	Are you a U.S. Citizen? ☐ Yes ☐ No
2. Spouse's First Name	M. I.	Last Name	Is spouse a U.S. Citizen? ☐ Yes ☐ No
3. Mailing Address	Apt#	City	State Zip Code
4. Contact Information Phone: Cell Phone: E-mail:			
5. Your Date of Birth	6. Your Job Title	Are you:	7. Legally Blind ☐ Yes ☐ No
		8. Totally and Permanently Disabled	☐ Yes ☐ No
9. Spouse's Date of Birth	10. Spouse's Job Title	Is Spouse:	11. Legally Blind ☐ Yes ☐ No
		12. Totally and Permanently Disabled	☐ Yes ☐ No
13. Can anyone claim you or your spouse on their tax return? ☐ Yes ☐ No ☐ Unsure			

Part II. Marital Status and Household Information

1. As of December 31, 2011, were you?
- ☐ Single
- ☐ Married: Did you live with your spouse during any part of the last six months of 2011? ☐ Yes ☐ No
- ☐ Divorced or Legally Separated: Date of final decree or separate maintenance agreement: _____
- ☐ Widowed: Year of spouse's death: _____

2. List names below of everyone who lived in your home in 2011 (other than you or spouse). Also list anyone who lived outside of your home that you supported during 2011. If additional space is needed please check here ☐ and list on page 3.

Name (first, last) Do not enter your name or spouse's name below.	Date of Birth (mm/dd/yy)	Relationship to you (e.g. daughter, son, mother, sister, none)	Number of months lived in your home in 2011	US Citizen or resident of the US, Canada or Mexico in 2011 (yes/no)	Marital Status as of 12/31/11 (S/M)	Full- time student in 2011 (yes/no)	Received less than \$3700 income in 2011 (yes/no)
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)

Section A. Please complete – check Yes, No or Unsure to all questions below. Please ask if you need help.

Part III. Income – In 2011, did you (or your spouse) receive:

Yes No Unsure

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| ☐ | ☐ | ☐ | 1. Wages or Salary? (Form W-2) |
| ☐ | ☐ | ☐ | 2. Tip Income? |
| ☐ | ☐ | ☐ | 3. Scholarships? (Forms W-2, 1098-T) |
| ☐ | ☐ | ☐ | 4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV) |
| ☐ | ☐ | ☐ | 5. Refund of state/local income taxes? (Form 1099-G) |
| ☐ | ☐ | ☐ | 6. Alimony Income? |
| ☐ | ☐ | ☐ | 7. Self-Employment payments (such as cash received for services, small business)? (Form 1099-MISC) |
| ☐ | ☐ | ☐ | 8. Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B) |
| ☐ | ☐ | ☐ | 9. Disability Income (such as payments from insurance or workers compensation)? (Forms 1099-R, W-2) |
| ☐ | ☐ | ☐ | 10. Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R) |
| ☐ | ☐ | ☐ | 11. Unemployment Compensation? (Form 1099-G) |
| ☐ | ☐ | ☐ | 12. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099) |
| ☐ | ☐ | ☐ | 13. Income (or loss) from Rental Property? |
| ☐ | ☐ | ☐ | 14. Other Income: (gambling, lottery, prizes, awards, jury duty, etc.) Specify: _____
(Forms W-2 G, 1099-MISC) |
-

Part IV. Expenses – In 2011 Did you (or your spouse) pay:

Yes No Unsure

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| ☐ | ☐ | ☐ | 1. Alimony: If yes, do you have the recipient's SSN? ☐ Yes ☐ No |
| ☐ | ☐ | ☐ | 2. Contributions to a retirement account? ☐ IRA ☐ Roth IRA ☐ 401K ☐ Other |
| ☐ | ☐ | ☐ | 3. Educational expenses paid for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T) |
| ☐ | ☐ | ☐ | 4. Unreimbursed employee business expenses (such as teacher supplies, uniforms or mileage)? |
| ☐ | ☐ | ☐ | 5. Medical expenses (including health insurance premiums)? |
| ☐ | ☐ | ☐ | 6. Home mortgage interest? (Form 1098) |
| ☐ | ☐ | ☐ | 7. Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098) |
| ☐ | ☐ | ☐ | 8. Charitable contributions? |
| ☐ | ☐ | ☐ | 9. Child/dependent care expenses, such as day-care? |
-

Part V. Life Events – In 2011 Did you (or your spouse):

Yes No Unsure

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| ☐ | ☐ | ☐ | 1. Have a Health Savings Account? (Forms 5498-SA, 1099-A, W-2 with code W in Box 12) |
| ☐ | ☐ | ☐ | 2. Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Form 1099-C) |
| ☐ | ☐ | ☐ | 3. Buy, sell or have a foreclosure of your home? (Form 1099-A) |
| ☐ | ☐ | ☐ | 4. Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year? _____ |
| ☐ | ☐ | ☐ | 5. Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)? |
| ☐ | ☐ | ☐ | 6. Live in an area that was affected by a natural disaster? If yes, where? _____ |
| ☐ | ☐ | ☐ | 7. Receive the First Time Homebuyers Credit in 2008? |
| ☐ | ☐ | ☐ | 8. Pay any student loan interest? (Form 1098-E) |
| ☐ | ☐ | ☐ | 9. Make estimated tax payments or apply last year's refund to your 2011 tax? If so how much?
_____ |
| ☐ | ☐ | ☐ | 10. Attend school as a full time student? (Form 1098-T) |
| ☐ | ☐ | ☐ | 11. Adopt a child? |
| ☐ | ☐ | ☐ | 12. File a 2010 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D? |
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Presidential Election Campaign Fund: (If you check a box, your tax or refund will not change.)Check here if you, or your spouse if filing jointly, want \$3 to go to this fund ☐ You ☐ Spouse
