

**2011 Individual Tax Return
Information Worksheet**

Taxpayer Name: _____ SS# _____ Date of Birth _____
 Spouse Name: _____ SS# _____ Date of Birth _____
 Dependents Name(s): _____ SS# _____ Date of Birth _____
 _____ SS# _____ Date of Birth _____
 _____ SS# _____ Date of Birth _____
 _____ SS# _____ Date of Birth _____

Address: _____

Home Phone: _____
 Alternate Phone: _____
 Email Address: _____

For first-time e-filers (only filed paper returns in the past): In order to avoid delays in electronically filing please:

1. Confirm that your name and SS# on your 2010 tax return matches your name and SS# as it appears on your Social Security Card for yourself, your spouse and all dependents. OR
2. Enclose a copy of your social security card, your spouse's and each of your dependents (not reported on your 2010 return).
3. If you do not have access to your social security card, please list the name and corresponding Social Security numbers for each person (yourself, spouse and dependents, as applicable) and sign the following statement:

I have provided the social security numbers for all individuals listed on my tax return. I have verified that the names and numbers listed match the social security card for each individual. I understand that a discrepancy between information provided and the information on file with the Social Security Administration will result in the return being rejected pending correction and may result in required paper filing. I am aware that this will cause a delay in the filing of my tax return.

X _____

1. Do you want your refund, if any directly deposited to your checking or savings account? YES NO
2. If yes, provide a voided check or your bank's routing number as well as your savings account number.
3. Are you aware that your tax balance due can be paid by check, debit from your bank account or via credit card (bank fees may apply). Additionally, if you are not in a position to pay your balance due in full, an installment plan can be requested (IRS user fees will apply)? YES NO
4. Please include the **original copy** of each of the following forms (make a copy for you to keep if you are mailing the package to me): W-2, 1099 R, 1099 MISC, 1098
5. Please provide a copy of the following forms, if applicable: 1099 INT, 1099 DIV, 1099R, 1099B, K-1
6. Do you have any household labor earning over \$1,000 during the year? YES NO
7. It has been publicized that the IRS is looking closely for offshore accounts. If you have an account with over \$10,000 in a foreign country, or a foreign business ownership (not through a mutual fund) please advise me as some special rules will apply to you.
8. Is the taxpayer or spouse claimed as a dependent on another return? YES NO
9. Did you receive correspondence or were you audited by either the IRS or State taxing agency? YES NO
10. May I check the box allowing the IRS to discuss your tax return with your preparer? YES NO
11. Did you receive Alimony during the year? _____ If yes, how much?
12. Did you pay Alimony during the year? _____ To whom _____ social security # of recipient: _____ How much? _____
13. Did you receive any unemployment compensation?
14. Did you have income from a sole proprietorship? _____ Please provide income and expense information, as well as automobile usage information (51 cents (1/1-6/30/11); 55.5 cents (7/1-12/31/11) per mile - be sure to have a log of business miles driven) and purchase or sale of equipment.
15. Did you use your home for business purposes (Area must be used exclusively for business and for the meeting of customers.)? If yes, please provide: House total sq. footage _____; Business use sq. footage _____
16. Did you have income from Rental Real Estate? _____ Please make a list of income and expenses for each property.

17. Did you receive a property tax refund or rebate? Amount _____
18. Did you sell any real estate during the year? _____ If yes please enclose copies of the closing statements for both the purchase and sale of the property.
19. Did you have any debt cancelled during 2011?
20. Did you receive any income from a trust or estate?
21. Did you receive any income from barter transactions?
22. Did you or your spouse have any foreign earned income?
23. Did you have any gambling winnings? Losses?
24. Did you make any contributions to a Traditional IRA, Nondeductible IRA, Roth IRA or SEP? _____ If yes, please indicate which and the amount of the contribution. _____.
25. Did you rollover any funds from an IRA or Retirement fund?
26. Did you pay any tuition and expenses for yourself, spouse or dependents to attend a college, university or vocational school? ____ if yes please enclosed tuition statements provided by the school.
27. Were there any distributions from education savings accounts or education furnished under a qualified tuition program (QTP)?
28. Did you make a contribution to your state's 529 Plan (education saving account)?
29. Did you pay an early withdrawal penalty on a certificate of deposit?
30. Did you incur a loss on worthless stock?
31. Did you incur a loss because of damaged or stolen property?
32. Are you a teacher for grades K-12, with unreimbursed employee expenses? (Note that the first \$250 will be treated as a deduction of gross income, the balance as an itemized deduction.)
33. Did you incur any unreimbursed, deductible moving expenses?
34. Please provide a list of all medical expenses including miles driven (19 cents (1/1-6/30/11); 23.5 (7/1-12/31/11) per mile - be sure to have a log), parking and tolls.
35. Did you purchase a home qualifying for the 2008 First-Time Homebuyer's Credit? If yes, provide HUD-1.
36. Please provide all forms 1098 reflecting mortgage interest for each of the following, as applicable: Primary Residence _____ Second Residence _____ Rental Property _____
37. Recent IRS scrutiny of home mortgage interest deductions now require us to carefully track re-financings and the use of loan proceeds. Please provide new home loan information, closing statements from any re-financings, and a summary of what any additional loan proceeds were used for.
38. Please provide the amount of Real Estate taxes paid:
Primary Residence _____ Second Residence _____
39. Did you incur any home energy efficient expenditures?
40. Did you purchase a new car during 2011? If yes, please include a copy of the purchase invoice.
41. Please provide the amount of cash gifts to charities (Be sure that you have the cancelled check for all contributions and a letter from the organization for amounts in excess of \$250. Without such documentation, you deduction will be disallowed if your return is audited.)
42. Please provide information regarding non-cash donations to charitable organizations. You must have a receipt from the organization noting that the items are in good or better condition.
43. Please provide charitable miles driven, if applicable. (14 cents per mile)
44. Provide a list of all unreimbursed employee expenses.
45. Please provide the date & amount of all estimated tax payments made for 2011:

Date Federal State(s): _____

Q1

Q2

Q3

Q4