

# Please follow these few steps . . .

To access your Tax Organizer, please follow the steps below.

**1 Print this Tax Organizer**

**2 New Clients please complete page I**

**3 Read the "Important Information" on pages II & III**

**4 Accumulate your tax documents**

**Generally,**

Income: W-2s, 1099-R, 1099-INT, 1099-DIV, rental, etc.

Deductions: 1098 for mortgage, contributions, medical, etc.

Other: Sale of home, purchase of home, etc.

**5 Complete the General Questions starting on and following page IV**

**Organize and attach your tax documents behind the corresponding pages of your tax organizer.** For example, paperclip (**do not staple**) all your W-2s behind the page in your tax organizer that lists your W-2s. **If you are unsure where to attach a document, paperclip it behind the last page of the Organizer, "1099-B Broker Statements. Miscellaneous Documents" page.** **Also put** all year-end **1099-B** broker statements behind this page.

**6 Sign the organizer on page IV**

**7 Sign the e-file forms and accompanying Refund/Payment options sheet**

Sign only. Do not date the e-file forms or enter any other information.

Complete the Refund/Payment options sheet which will tell us how you wish to receive your refunds or pay any balance due.

**8 Return the tax organizer and e-file forms to us**

Include the signed (undated) e-file forms and Refund/Payment options sheet (see **7** above).

Please KEEP COPIES (or send us copies) of your original tax documents.

To help control costs, we will not return any documents you send **unless you request we do so**. We will destroy these documents after 3 years.

## IMPORTANT DATES TO REMEMBER:

**March 1, 2013:** Last date to receive all pertinent information to complete your personal tax returns by April 15, 2013.

**Hope Scholarship / FASFA:** Please provide us with all pertinent tax information preferably 2 weeks prior to the date you need your completed tax return for Hope Scholarship or FASFA, but no less than 7 days.














# NEW CLIENTS

## General Information

	TAXPAYER	SPOUSE
FIRST NAME & Middle Initial	_____	_____
LAST NAME	_____	_____
SOCIAL SEC #	_____	_____
DATE of BIRTH	_____	_____
ADDRESS	Street 1	_____
	Street 2 / PO Box	_____
	City / State / Zip	_____
TELEPHONE DAYTIME	_____	_____
EVENING	_____	_____
CELL	_____	_____
E-MAIL	_____	_____

	DEPENDENT 1	DEPENDENT 2	DEPENDENT 3	DEPENDENT 4	DEPENDENT 5
FIRST NAME	_____	_____	_____	_____	_____
LAST NAME (if different)	_____	_____	_____	_____	_____
SOCIAL SEC. #	_____	_____	_____	_____	_____
DATE of BIRTH	_____	_____	_____	_____	_____

## IMPORTANT INFORMATION. PLEASE READ AND SIGN YOUR TAX ORGANIZER FOLLOWING THIS SECTION.

-  **NEW CLIENTS.** Please ***BE SURE TO COMPLETE*** the General Information section of your organizer. Also, be sure to read carefully the following points. You can help us process your work more efficiently by understanding our procedures.
-  **CURRENT CLIENTS.** Please ***BE SURE TO REVIEW AND UPDATE*** the General Information section, making any necessary changes, such as change of address, phone number, email, etc.
-  **RESPONSIBILITY.** First and foremost, ***remember that YOU are responsible*** for keeping necessary records of your income and deductions, and YOU have the final responsibility for the content of your tax returns. Our responsibility, as for all CPAs, lies in our skill to use your information to your best benefit.
-  **APPOINTMENTS. WE CANNOT MEET WITHOUT SCHEDULING APPOINTMENTS.** We will make every effort to arrange a convenient time for you if we cannot schedule an appointment during our normal business hours. Please call our office Monday through Friday to schedule your appointment in Fayetteville or Atlanta.
-  **MAIL, EMAIL, OR DELIVER YOUR ORGANIZER TO OUR OFFICES.** Many times, appointments are unnecessary if you complete and mail, email, or deliver your organizer to us. We will contact you with any questions. If you SCAN and email your organizer and documents, please scan only one document per page.
-  **WE WILL NOT RETURN DOCUMENTS UNLESS YOU REQUEST US TO.** In an effort to hold down costs, we will not return the documents you provide unless you request us to. Please retain copies of all documents you send us.
-  **ITEMIZED DEDUCTIONS.**  
HEALTH INSURANCE PREMIUMS: "Pre-tax" amounts are not deductible.  
If you have included payments for health insurance premiums, DO NOT list any "pre-tax" amounts.  
AD VALOREM TAXES: DO NOT include the cost of tags.  
PERSONAL PROPERTY TAXES: Remember to INCLUDE tax paid on a boat or plane.
-  **RECEIPT TOTALS.** Please provide us with income and expense "**TOTALS.**"  
*Please DO NOT BRING US ENVELOPES OF LOOSE, UNTOTALED RECEIPTS.*
-  **RECEIPTS.** Save all receipts for tax purposes such as audits.  
Examples: Sales tax on car; Medical payments; Home remodeling. Email us if you are unsure.
-  **REQUESTS FOR ADDITIONAL INFORMATION.** We may request copies of information to document justification of positions in your favor. We will not audit nor otherwise verify data that you submit, but we may ask that you clarify some items to enable us to fully understand your tax position and to properly prepare your returns.
-  **ERRORS.** In the rare instance in which our work contains an error, we reserve the right to amend or correct your return at no charge for our time. Please inform us immediately of any such errors.
-  **AUDITS.** All tax returns are subject to review by the taxing authorities. Should your return be selected for audit, please advise us immediately so that we may discuss with you the best method under which to proceed.
-  **CONTACTING US.** At times during tax season we are not available to answer your call. However, you may contact us in a variety of ways. If possible, we prefer you **E-MAIL** us at **IRSGOAWAY@AOL.COM**. If not possible, FAX your message to 770-461-8535, or leave a message or question on our voice mail so we can be prepared when we return your call.

## IMPORTANT INFORMATION. PLEASE READ AND SIGN YOUR TAX ORGANIZER FOLLOWING THIS SECTION.

- ↪ **TURNAROUND.** Your tax return is customized for you. We take the time necessary to ensure that we have kept your income taxes to the absolute minimum. If you require quick turnaround, please advise us when you schedule your appointment or when you send us your completed tax checklist. "Final" information received from you after March 1 will most likely ensure completion will be after April 15. We will prepare an extension.
- ↪ **EXTENSIONS.** We will make every effort to have your tax return prepared before **April 15.** However, if we have not received all necessary information from you **BY MARCH 1,** we will prepare, and possibly file an extension for you. *An extension neither increases nor decreases your chance of an audit.* We will estimate how much tax payment, if any, is to be sent with your extension.
- ↪ **AFTER MARCH 1.** As a precaution we will prepare extensions for all tax returns, regardless of whether or not they will be used. Please make every effort to send us your work more than five weeks prior to the end of the season.
- ↪ **MORTGAGE FINANCING & REFINANCING / FASFA / HOPE SCHOLARSHIP.** If your mortgage company will need financial information or tax returns prepared by us, or if you need tax returns for FASFA or the Hope Scholarship, *Please provide at least seven days notice, and preferably longer, before the date the requested information is needed.*
- ↪ **SERVICES WE OFFER IN ADDITION TO TAX PREPARATION.** Throughout the year we are available for consultation regarding your questions on specific tax matters or assistance in tax and business planning. However, we will not offer recommendations as to investment quality of any specific stock, bond, limited partnership or similar investment.
- ↪ **FEE.** Fees for tax preparation and for all other related services are based on time spent at our hourly standard rates. Tax preparation: generally, \$95 per hour. Other: \$65 - \$125 per hour. Review of "client-prepared" tax return: minimum \$150. Estimated MINIMUM charge for the completion of both an individual's federal and state returns: \$190.00. Estimated AVERAGE charge for the completion of both an individual's federal and state returns: \$295.00. *Actual charges often vary from these estimates, depending on the complexity of the returns.* Charge for additional copies of tax returns and support in divorce situations, for replacements, etc., is \$45 minimum. Either or both spouses or taxpayers may request.
- ↪ **ONLINE PAYMENT.** For your convenience, we accept Credit Card payments online through MasterCard, Visa, American Express, and Discover. At this time, WE DO NOT ACCEPT DEBIT CARDS.
- ↪ **TO KEEP YOUR COST OF TAX PREPARATION TO A MINIMUM:** PLEASE INCLUDE ALL PERTINENT TAX DATA WITH YOUR CHECKLIST or note that information will follow. We will charge to redo completed returns for data received late.
- ↪ **ALSO, WE WILL DELIVER YOUR TAX RETURN IN PDF FORMAT VIA EMAIL.** If you require a paper copy, please contact us.
- ↪ **INVOICING & PAYMENT.** We prefer to invoice clients via e-mail. We would appreciate your participation. Please make sure you check the appropriate response on the following page regarding invoice via e-mail.
- ↪ **BILLING OF COMPLETED WORK.** In general, a service charge of 1.5% per month will be added to all accounts not paid currently unless you contact us to make arrangements for payment.
- ↪ **PRIVACY POLICY.** All non-public information about our clients is restricted to those members of our staff who need to know such information in order to provide the services you requested. We will not sell your name to any other firm. From time to time we may provide your name to firms we work with to inform you of financial information that could benefit you.

**PLEASE SIGN YOUR TAX ORGANIZER BELOW**

To the best of my (our) knowledge and belief, the information provided to Oddo Brothers CPAs in this tax organizer and accompanying supplement and / or notes, is true and correct.  
 Also, I (we) have read and understand the preceding information regarding operating procedures of Oddo Brothers CPAs and agree to abide by them while having Oddo Brothers CPAs prepare our tax returns or other work.



**TAXPAYER**



**SPOUSE**

DATE \_\_\_\_\_

DATE \_\_\_\_\_

**2012 TAX QUESTIONS**

**GENERAL QUESTIONS**

YES	NO	N/A
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

Are your names, including your dependents' names, as printed in this Tax Organizer in the GENERAL INFORMATION section, spelled as they appear on your Social Security Card(s)? If not, please make the necessary corrections.

Is your address, as printed in this Tax Organizer in the GENERAL INFORMATION section, correct? If not, please make the necessary corrections next to your address.

**SPECIAL NOTE REGARDING DECEASED SPOUSES:** If a joint tax return was prepared last year under the names of the surviving and deceased spouses, this tax return will be filed under the name of the surviving spouse only. There is no need to correct your name.

Have COPIES of **ALL** pertinent **2012** tax information been enclosed with this Tax Organizer? If additional information follows, **amendments or changes made to your tax returns for incomplete data will be charged for.**

YES	NO	N/A
<input type="checkbox"/>	<input type="checkbox"/>	

Are your phone number(s), e-mail address(es), and/or fax numbers, as printed in this Tax Organizer, correct? If not, please make corrections.

**E-mail:** We have found e-mail to be one of the best ways to contact our clients. It allows us to be more accessible, as well as more efficient in the use of our clients' time. We have installed security to guard your confidential information during transmissions. Our goal is to provide the best service possible, and e-mail is a great tool to help us achieve that end.

**Invoicing:** We will invoice you via email.

**Telephone:** If we need to call you, what are the best times to contact you via telephone? We do not want to call you too early or too late.

Telephone No: \_\_\_\_\_

Best times to call: \_\_\_\_\_

## 2012 TAX QUESTIONS

### GENERAL QUESTIONS

YES	NO	N/A

**IN LIEU OF A PRINTED TAX RETURN**, we will deliver your copy via e-mail in PDF printable format unless you request otherwise. Please mark your appropriate preferences.

PDF format via E-mail.

Traditional paper format (paper requires more time to process to completion).

YES	NO	N/A

**IRA CONTRIBUTION:** Will you make a **TRADITIONAL** IRA Contribution by **April 15, 2013**?

**IRA CONTRIBUTION:** Will you make a **ROTH** IRA Contribution by **April 15, 2013**?

Taxpayer \$ \_\_\_\_\_  Taxpayer's Spouse \$ \_\_\_\_\_

**TAX ESTIMATES:** Do you wish us to calculate **2013** income tax estimates? (usually unnecessary if your withholding is adequate and consistently overpaid)

YES	NO	N/A

Did you make any contributions to a qualified higher education program / qualified higher education college savings account (**Section 529 Plan**)? Such payments may be deductible on your state income tax return.

YES	NO	N/A

**TAXPAYER:** Do you wish to contribute \$3 to the presidential campaign fund?

**SPOUSE:** Do you wish to contribute \$3 to the presidential campaign fund?

YES	NO	N/A

Did your employer reimburse any employee business expenses, including overnight travel? If yes, please see section **EMPLOYEE BUSINESS EXPENSES** found later in this organizer.

YES	NO	N/A

**NON-CASH CONTRIBUTIONS** of \$250 or more. **SPECIAL NOTE:** The IRS requires taxpayers to maintain written documentation indicating the name of the donee(s), the date(s) of the contribution(s), and the amount(s) of the contribution(s) for all cash **AND** non-cash charitable contributions. Without this support, the IRS may deny the deduction(s).

DATE	DONEE	DESCRIPTION	VALUE
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

## 2012 TAX QUESTIONS

### AT ANY TIME DURING 2012:

YES	NO	N/A

Were any changes made to your prior year's tax return by you, the IRS, or the State? If yes, please provide details (e.g. change in refund received). If not, we will use the information shown on your prior year's tax return:

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YES	NO	N/A

Did you prepare and file your own extension(s)? If yes, how much was paid with extension(s)?

Federal     \$ \_\_\_\_\_                      State     \$ \_\_\_\_\_

Did you receive retirement plan distributions (e.g. IRA, 401-k, etc.)?  
If yes, please provide copies of your 1099Rs.

If yes, were they rolled over within 60 days?

If yes, were any funds used to pay for post secondary schooling  
or as a down payment on the purchase of a first home?

Did you pay SALES TAX on any major purchase(s)? (e.g. new car)     \$ \_\_\_\_\_

Are you considering bankruptcy? If so, consider reviewing your plan with us for tax consequences and possible tax strategies. For example, you should consider not filing bankruptcy until your tax returns are filed up-to-date.

### DEPENDENT INFORMATION

NAME of Dependent  
(do not include yourself or your spouse)

Last Name, if different

	YES	NO	YES	NO	YES	NO
Dependent is married?						
... is a U.S. citizen?						
... is a full-time student 5 or more months?						
... if in college, in what year?						
... received more than 1/2 support from Taxpayer?						
Wages of Dependent	\$	_____	\$	_____	\$	_____
Investment income of Dependent	\$	_____	\$	_____	\$	_____

IN ADDITION TO THE DEPENDENT INFORMATION PROVIDED ABOVE, PLEASE VERIFY, AND CORRECT IF NECESSARY, THE DEPENDENT INFORMATION IN THE FOLLOWING SECTION ENTITLED "GENERAL INFORMATION."

## 2012 TAX QUESTIONS

**AT ANY TIME DURING 2012:**

YES	NO

Wages?

Tips?

Interest or Dividends?

Social Security or Tier I Railroad Retirement?

Lump sum from an employer sponsored plan and the recipient and/or employee was born before 1936?


Retirement or IRA distribution for which the recipient is under age 59 1/2?

Other pension, annuity, IRA, or retirement income?

If IRA distribution, were nondeductible contributions ever made?

If yes, provide the balance of all IRA accounts as of the end of 2012.   \$ \_\_\_\_\_


Unemployment compensation?

Alimony?

Self-employment and/or operation of a business?

Operation of a farm?

Rental of land and property for agricultural purposes?

Other rental property?

Gambling winnings? If you are claiming gambling losses, be sure to have supporting data which will include the dates gambled, places gambled. Be sure to report winnings which have not been reported to you.


Royalties?

Any miscellaneous income, such as prizes or jury duty pay?

YES	NO

**Did you or your spouse receive any of the following forms: (Please provide them to your preparer)**

W-2

W-2G

1099R

1099 INT

1099 DIV

1099 MISC

1099B

1099S

1099G

Any other 1099

K-1

IRS notice of change to prior year's return

Closing statements from real estate sales, purchases, or refinancing



# 2012 TAX QUESTIONS

AT ANY TIME DURING 2012:

YES	NO

**Did you or your spouse sell or dispose of any of the following property:**

- Stock, mutual fund, or other non-business assets?
- Your personal residence?
- Rental Property?
- Property relating to a business or farm?
- Any other business property not listed above (i.e. equipment, land)?
- If you sold any property above, did it involve a bartering agreement?
- If you sold any property above, are you receiving payments in installments?

YES	NO

**Did you or your spouse**

- Have a home mortgage?
- Refinance your home mortgage?
- Use a portion of your home exclusively for business?
- Have medical expenses or pay for health insurance?
- Make regular or substantial contributions to charity, church, etc.?  
If yes, did you make over \$500.00 in non-cash contributions?
- Suffer a loss as a result of a casualty (fire, theft, natural disaster, etc.)?
- Incur any out-of-pocket expenses or use your personal vehicle in conjunction with your job?
- Move to be closer to a new job?
- Send payments to the IRS/state in order to prepay your current year tax liability (estimated taxes) or apply an overpayment from 2011??
- Have any interest in a partnership or S-corporation, estate or trust for which you expect to receive Form K-1?
- Have any household employees to whom you paid \$1000.00 or more?
- Have a qualified fuel tax credit?
- Contribute to an:  IRA?  SEP?  Keogh? or  Simple retirement plan?
- Get claimed (or were eligible to be claimed) as a dependent on anyone else's return?

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- Did your children receive more than \$950 and less than \$9500 from interest and dividends that you wish to claim on your own tax return instead of your child's?
- Did you pay child or dependent care expenses? If so, please provide names, addresses, Social Security/EIN numbers, amount paid to each provider, and amount paid for each dependent.
- Did you pay qualified post-secondary education tuition and related expenses for yourself, your spouse, or your dependents?
- Did you cash any US EE or I bonds to pay for post-secondary education for yourself, your spouse, or your dependents?
- Did you pay interest on higher education loans?
- Were you a pre-college educator who purchased books or classroom supplies?
- Did you purchase a car, boat, aircraft, motor home or home building materials in 2012 or keep receipts on all sales tax items purchased in 2012?
- Were there any births, adoptions, divorces, marriages, or deaths in your household?
- Do you desire direct deposit? If yes, please attach voided check.

# W-2 INCOME

2012  
(W-2)

Listed below are your employers shown on your last year's income tax return.

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

Name of employer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE

**\* Please include a W-2 from each of your 2012 employers.**

**W-2G INCOME**

**2012  
(W-2G)**

Listed below are payers shown on your last year's income tax return.

**\*Please include any W-2G from each of your 2012 payers.**

Name of payer \_\_\_\_\_  
 Street address \_\_\_\_\_  
 City, State, Zip Code \_\_\_\_\_  
 Federal Identification Number \_\_\_\_\_  
 TAXPAYER  SPOUSE

Name of payer \_\_\_\_\_  
 Street address \_\_\_\_\_  
 City, State, Zip Code \_\_\_\_\_  
 Federal Identification Number \_\_\_\_\_  
 TAXPAYER  SPOUSE

Name of payer \_\_\_\_\_  
 Street address \_\_\_\_\_  
 City, State, Zip Code \_\_\_\_\_  
 Federal Identification Number \_\_\_\_\_  
 TAXPAYER  SPOUSE

**ESTIMATED TAX PAID FOR THE 2012 TAX YEAR**

**(FED/ST TAX)**

**\* Please enter only the payments to be applied to the current year tax, including any payments made in January of 2012.**

**Federal payments**

**State of \_\_\_\_\_ payments**

Date paid	Amount paid	Date paid	Amount paid
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

State/local income tax balance due for previous years paid in 2012: \_\_\_\_\_

State/local estimate payment for 2011, due January 15, 2012, paid on or after January 1, 2012: \_\_\_\_\_

# PENSION AND RETIREMENT INCOME

2012  
(1099R)

## PENSIONS AND IRAS

Listed below are your pension, IRA distributions, and Social Security received last year (if any).

Name of payer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE  IRA

Name of payer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE  IRA

Name of payer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE  IRA

Name of payer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE  IRA

Name of payer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE  IRA

Name of payer \_\_\_\_\_  
Street address \_\_\_\_\_  
City, State, Zip Code \_\_\_\_\_  
Employer Identification Number \_\_\_\_\_

TAXPAYER  SPOUSE  IRA

\* Please include any 1099's and other 2012 information.

If you ever made non-deductible contributions to your IRA, please provide year-end balances of all your IRA accounts.

## SOCIAL SECURITY BENEFITS

(1040 WKT)

### 2012 AMOUNTS

Taxpayer Amount \$ \_\_\_\_\_

Spouse Amount \$ \_\_\_\_\_

### 2011 TOTAL AMOUNT

\_\_\_\_\_

# PARTNERSHIP AND S-CORPORATION INCOME

2012  
(K-1 P/S)

Your 2011 K-1 information is shown below.

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

## K-1 INFORMATION

Name of Partnership or S-Corporation \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
Enter "P" for partnership or "S" for S-Corp \_\_\_\_\_

\* Please attach all K-1 schedules received for 2012.

# ESTATE AND TRUST INCOME

2012  
(K-1 E/T)

Your 2011 K-1 information is shown below.

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

## K-1 INFORMATION

Name of Estate, Trust \_\_\_\_\_  
Federal ID Number \_\_\_\_\_  
If any rental real estate, are you an active participant? \_\_\_\_\_

\* Please attach all K-1 schedules received for 2012.









**OTHER INCOME AND ADJUSTMENTS**

2012

**OTHER INCOME**

2012

2011

**Seller Financed Mortgages**

Payer	Principal	Interest	Interest
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**State and Local Income Tax Refunds Received in 2012**

State or Local jurisdiction _____	Amount received _____
State or Local jurisdiction _____	Amount received _____
State or Local jurisdiction _____	Amount received _____

**Unemployment** (Please attach 1099G(s)).

2012

2011

Amount received: _____	_____
Amount repaid: _____	_____

**Alimony amount received**

_____
_____

**Other Income**

Type: _____	Amount: _____
-------------	---------------

**ADJUSTMENTS**

Taxpayer  
2012

Taxpayer  
2011

Spouse  
2012

Spouse  
2011

Educator expense _____	_____	_____	_____
Self-employed retirement plans _____	_____	_____	_____
Self-employed health insurance paid _____	_____	_____	_____

**IRA'S**

Traditional _____	_____	_____	_____
Roth _____	_____	_____	_____

Student loan interest _____	_____	_____	_____
-----------------------------	-------	-------	-------

**Alimony Paid**

To whom paid: _____	Amount: _____
---------------------	---------------

SSN: _____
------------

**Tuition and Fees**

Amount: _____
---------------

**Other Adjustments**

Type: _____	Amount: _____
-------------	---------------

# BUSINESS INCOME AND EXPENSES

2012  
(SCH C)

Your principal business or profession \_\_\_\_\_

Is this your spouse's Schedule C? \_\_\_\_\_

Business name \_\_\_\_\_

2011 Business code \_\_\_\_\_

Business address \_\_\_\_\_

Employer ID \_\_\_\_\_

(Not SSN)

Accounting method: \_\_\_\_\_

Enter date if you disposed of or sold this business during the year \_\_\_\_\_

## BUSINESS VEHICLE

2012

2011

Date placed in service \_\_\_\_\_

Miles used for: Business \_\_\_\_\_

Commuting \_\_\_\_\_

Other \_\_\_\_\_

## PART I INCOME

Gross receipts or sales \_\_\_\_\_

Returns and allowances \_\_\_\_\_

Other income \_\_\_\_\_

## PART II EXPENSES

Advertising \_\_\_\_\_

Car/Truck expenses \_\_\_\_\_

Commissions \_\_\_\_\_

Contract labor \_\_\_\_\_

Depletion \_\_\_\_\_

Employee benefit programs \_\_\_\_\_

Insurance \_\_\_\_\_

Interest - mortgage \_\_\_\_\_

Interest - other \_\_\_\_\_

Legal and professional services \_\_\_\_\_

Office expense \_\_\_\_\_

Pension and profit sharing \_\_\_\_\_

Rent or lease - vehicles, machinery \_\_\_\_\_

Rent - Other business property \_\_\_\_\_

Repairs and maintenance \_\_\_\_\_

Supplies \_\_\_\_\_

Taxes and licenses \_\_\_\_\_

Travel \_\_\_\_\_

Meals and entertainment \_\_\_\_\_

Utilities \_\_\_\_\_

Wages \_\_\_\_\_

Enter prior year unallowed loss (if any) \_\_\_\_\_

## OTHER EXPENSES

(SCH C PG 2)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Inventory method:  Cost  Lower of Cost or Market  Other

Inventory at beginning of year \_\_\_\_\_

Purchases less cost of personal items \_\_\_\_\_

Inventory at end of the year \_\_\_\_\_

# OFFICE IN THE HOME DEDUCTION

2012  
(8829)

2011

Square footage of area used for business \_\_\_\_\_

Total square footage in your home \_\_\_\_\_

Is this your spouse's Schedule C? \_\_\_\_\_

Day care facilities:

Number of days used for day care \_\_\_\_\_

Number of hours per day used for day care \_\_\_\_\_

Enter date if you disposed of or sold this business during the year \_\_\_\_\_

## EXPENSES DIRECTLY RELATING TO YOUR BUSINESS

2012

2011

Casualty losses \_\_\_\_\_

Deductible mortgage interest \_\_\_\_\_

Real estate taxes \_\_\_\_\_

Insurance \_\_\_\_\_

Rent \_\_\_\_\_

Repairs and maintenance \_\_\_\_\_

Utilities \_\_\_\_\_

Other expenses \_\_\_\_\_

## EXPENSES RELATING TO ENTIRE HOUSEHOLD

Casualty losses \_\_\_\_\_

Deductible mortgage interest \_\_\_\_\_

Real estate taxes \_\_\_\_\_

Insurance \_\_\_\_\_

Rent \_\_\_\_\_

Repairs and maintenance \_\_\_\_\_

Utilities \_\_\_\_\_

Other expenses \_\_\_\_\_

Carryover of operating expenses from 2011 Form 8829 line 42 \_\_\_\_\_

Carryover of excess casualty losses and depreciation from 2011 Form 8829 line 43 \_\_\_\_\_

Enter the fair market value of your home \_\_\_\_\_

Enter the cost of your home \_\_\_\_\_

Enter the value of the land on which your home is placed \_\_\_\_\_



## 2012 TAX QUESTIONS

### RENTAL REAL ESTATE Report income and expenses on next page

TYPE OF PROPERTY	PROPERTY A	PROPERTY B	PROPERTY C
Single Family Residence			
Multi-Family Residence			
Vacation/Short-Term Rental			
Commercial			
Land			
Royalties			
Self-Rental			
Other (describe)			
No. of Days Rented			
No. of Personal Use Days			
Was property part of a Joint Venture?			

**PHYSICAL ADDRESS**

Property A

---



---



---

Property B

---



---



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Property C

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# RENTAL REAL ESTATE AND ROYALTIES

2012  
(SCH E)

	Property A		Property B		Property C	
	2012	2011	2012	2011	2012	2011
KIND OF PROPERTY						
LOCATION OF PROPERTY						
CITY						
STATE						
ZIP						
<b>INCOME</b>						
Merchant card and 3rd party payments						
Other payments						
<b>EXPENSES</b>						
Advertising						
Auto and travel						
Cleaning and maintenance						
Commissions						
Insurance						
Legal, professional fees						
Management fees						
Mortgage interest						
Other interest						
Repairs						
Supplies						
Taxes						
Utilities						
<b>Miscellaneous Expenses</b>						
Type of misc expense 1						
Amount item 1						
Type of misc expense 2						
Amount item 2						
Type of misc expense 3						
Amount item 3						
Type of misc expense 4						
Amount item 4						
Enter loss carryover to 2012						
Did you actively participate in this venture?						
Did you use this property for personal use?						

## 2012 TAX QUESTIONS

### RENTAL REAL ESTATE Report income and expenses on next page

TYPE OF PROPERTY	PROPERTY D	PROPERTY E	PROPERTY F
Single Family Residence			
Multi-Family Residence			
Vacation/Short-Term Rental			
Commercial			
Land			
Royalties			
Self-Rental			
Other (describe)			
No. of Days Rented			
No. of Personal Use Days			
Was property part of a Joint Venture?			

**PHYSICAL ADDRESS**

Property D

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Property E

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Property F

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---



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# RENTAL REAL ESTATE AND ROYALTIES

2012  
(SCH E)

	Property D		Property E		Property F	
	2012	2011	2012	2011	2012	2011
KIND OF PROPERTY						
LOCATION OF PROPERTY						
CITY						
STATE						
ZIP						
<b>INCOME</b>						
Merchant card and 3rd party payments						
Other payments						
<b>EXPENSES</b>						
Advertising						
Auto and travel						
Cleaning and maintenance						
Commissions						
Insurance						
Legal, professional fees						
Management fees						
Mortgage interest						
Other interest						
Repairs						
Supplies						
Taxes						
Utilities						
<b>Miscellaneous Expenses</b>						
Type of misc expense 1						
Amount item 1						
Type of misc expense 2						
Amount item 2						
Type of misc expense 3						
Amount item 3						
Type of misc expense 4						
Amount item 4						
Enter loss carryover to 2012						
Did you actively participate in this venture?						
Did you use this property for personal use?						

**ITEMIZED DEDUCTIONS**

**2012  
(SCH A)**

**\*T,S,J                      2012**

**2011**

**MEDICAL AND DENTAL EXPENSES - Include prescription medicine & drugs, nonprescription medical supplies such as crutches, doctors, dentists, nurses, hospitals, medical insurance premiums, medical miles or actual expense.\***

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Number of medical miles

\* Do not list amounts paid with pre-tax dollars or that were reimbursed.

\* Taxpayer, Spouse, or Joint

**TAXES PAID**

Real estate taxes	_____	_____	_____
Personal property taxes	_____	_____	_____
Other _____	_____	_____	_____

**INTEREST PAID**

Home mortgage interest	_____	_____	_____
Points paid in purchasing new home	_____	_____	_____
Qualified Mortgage Insurance Premium	_____	_____	_____
Investment interest expense	_____	_____	_____

**CONTRIBUTIONS - Receipts required for all contributions**

Cash	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Non-cash	_____	_____	_____
Number of charity miles	_____	_____	_____

**MISCELLANEOUS DEDUCTIONS**

Include union and professional dues, business publications, etc.	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Tax preparation fee	_____	_____	_____
Include below items, such as safe deposit box, investment expense.	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Gambling losses	_____	_____	_____

# EMPLOYEE BUSINESS EXPENSES

(For the taxpayer)

2012  
(2106/2106 EZ)

## GENERAL INFORMATION

2012

2011

Are these your spouse's business expenses? \_\_\_\_\_  
Occupation in which expense incurred? \_\_\_\_\_  
Were you a qualified performing artist? \_\_\_\_\_  
Were you a fee basis state or local government official? \_\_\_\_\_  
Were you a National Guard reserve member who traveled more than 100 miles from home to perform services as a National Guard or reserve member? \_\_\_\_\_

## EXPENSES

Parking fees, tolls, and local transportation \_\_\_\_\_  
Travel expenses while away from home overnight \_\_\_\_\_  
Meals and entertainment expenses \_\_\_\_\_  
Are you subject to the hours of service limitation of the Department of Transportation? \_\_\_\_\_  
Other business expenses \_\_\_\_\_

Type	Amount
_____	_____
_____	_____
_____	_____
_____	_____

## REIMBURSEMENTS

Meals and entertainment \_\_\_\_\_  
Other \_\_\_\_\_

## AUTOMOBILE INFORMATION

### VEHICLE A

Date vehicle was placed in service \_\_\_\_\_  
Total mileage vehicle was used during the year \_\_\_\_\_  
Miles that vehicle was used for business \_\_\_\_\_  
Miles that vehicle was used for commuting \_\_\_\_\_

#### ACTUAL EXPENSES

Gas, repairs, insurance, etc. \_\_\_\_\_  
Vehicle rental \_\_\_\_\_  
Cost or other basis of vehicle \_\_\_\_\_

### VEHICLE B

Date vehicle was placed in service \_\_\_\_\_  
Total mileage vehicle was used during the year \_\_\_\_\_  
Miles that vehicle was used for business \_\_\_\_\_  
Miles that vehicle was used for commuting \_\_\_\_\_

#### ACTUAL EXPENSES

Gas, repairs, insurance, etc. \_\_\_\_\_  
Vehicle rental \_\_\_\_\_  
Cost or other basis of vehicle \_\_\_\_\_

Do you (or your spouse) have another vehicle available for personal use? \_\_\_\_\_  
Was your vehicle available for personal use during off-duty hours? \_\_\_\_\_  
Do you have evidence to support the deduction? \_\_\_\_\_  
If "Yes," is the evidence written? \_\_\_\_\_

**EMPLOYEE BUSINESS EXPENSES****(FOR SPOUSE)****2012  
(2106/2106 EZ)****GENERAL INFORMATION****2012****2011**

Are these your spouse's business expenses? \_\_\_\_\_

Occupation in which expense incurred? \_\_\_\_\_

Were you a qualified performing artist? \_\_\_\_\_

Were you a fee basis state or local government official? \_\_\_\_\_

Were you a National Guard reserve member who traveled more than 100 miles from home to perform services as a National Guard or reserve member? \_\_\_\_\_

**EXPENSES**

Parking fees, tolls, and local transportation \_\_\_\_\_

Travel expenses while away from home overnight \_\_\_\_\_

Meals and entertainment expenses \_\_\_\_\_

Are you subject to the hours of service limitation of the Department of Transportation? \_\_\_\_\_

Other business expenses \_\_\_\_\_

Type	Amount
_____	_____
_____	_____
_____	_____
_____	_____

**REIMBURSEMENTS**

Meals and entertainment \_\_\_\_\_

Other \_\_\_\_\_

**AUTOMOBILE INFORMATION****VEHICLE A**

Date vehicle was placed in service \_\_\_\_\_

Total mileage vehicle was used during the year \_\_\_\_\_

Miles that vehicle was used for business \_\_\_\_\_

Miles that vehicle was used for commuting \_\_\_\_\_

**ACTUAL EXPENSES**

Gas, repairs, insurance, etc. \_\_\_\_\_

Vehicle rental \_\_\_\_\_

Cost or other basis of vehicle \_\_\_\_\_

**VEHICLE B**

Date vehicle was placed in service \_\_\_\_\_

Total mileage vehicle was used during the year \_\_\_\_\_

Miles that vehicle was used for business \_\_\_\_\_

Miles that vehicle was used for commuting \_\_\_\_\_

**ACTUAL EXPENSES**

Gas, repairs, insurance, etc. \_\_\_\_\_

Vehicle rental \_\_\_\_\_

Cost or other basis of vehicle \_\_\_\_\_

Do you (or your spouse) have another vehicle available for personal use? \_\_\_\_\_

Was your vehicle available for personal use during off-duty hours? \_\_\_\_\_

Do you have evidence to support the deduction? \_\_\_\_\_

If "Yes," is the evidence written? \_\_\_\_\_

# CHILD AND DEPENDENT CARE EXPENSES

2012  
(2441)

Please list all care providers and the amounts paid to them in 2012. Any information from the prior year is shown below.

Name of provider	_____		
Street address	_____		
City, State, Zip Code	_____		
Social Security Number or EIN	_____		
Amount paid	\$ _____	<b>2011 AMOUNT</b>	\$ _____

Name of provider	_____		
Street address	_____		
City, State, Zip Code	_____		
Social Security Number or EIN	_____		
Amount paid	\$ _____	<b>2011 AMOUNT</b>	\$ _____

Name of provider	_____		
Street address	_____		
City, State, Zip Code	_____		
Social Security Number or EIN	_____		
Amount paid	\$ _____	<b>2011 AMOUNT</b>	\$ _____

Name of provider	_____		
Street address	_____		
City, State, Zip Code	_____		
Social Security Number or EIN	_____		
Amount paid	\$ _____	<b>2011 AMOUNT</b>	\$ _____

Name of provider	_____		
Street address	_____		
City, State, Zip Code	_____		
Social Security Number or EIN	_____		
Amount paid	\$ _____	<b>2011 AMOUNT</b>	\$ _____

List name of each child and total amount spent for care of that child.

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

\*You may change or delete any information that does not apply to the current year.

