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 ______________________

2010 TAX QUESTIONS

GENERAL QUESTIONS

YES	NO	N/A	
			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 2010 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	
			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:*

2010 TAX QUESTIONS

GENERAL QUESTIONS

YES	NO	N/A	
			IRA CONTRIBUTION: Will you make a ***TRADITIONAL*** IRA Contribution by April 15, 2011?
			IRA CONTRIBUTION: Will you make a ***ROTH*** IRA Contribution by April 15, 2011?
			☐ Taxpayer $ ______ ☐ Taxpayer's Spouse $ ______
			TAX ESTIMATES: Do you wish us to calculate 2011 income tax estimates? (ususally 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
			$
			$
			$
			$

2010 TAX QUESTIONS

AT ANY TIME DURING 2010:

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:

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) $______

YES	NO	N/A	
			Did you purchase and place in service a hybrid vehicle by December 31, 2010? If yes, please provide us with information on your purchase. Certain hybrid vehicles are still eligible for tax incentives.

DEPENDENT INFORMATION

NAME of Dependent (do not include youself or your spouse)										
Last Name, if different										
	YES	NO	YES	NO	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 ½ 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."

2010 TAX QUESTIONS

AT ANY TIME DURING 2010:

Did you or your spouse receive income from the following sources:

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 2010.
		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?
		Royalties?
		Any miscellaneous income, such as prizes or jury duty pay?

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

YES	NO	
		W-2
		W-2G
		1099R
		1099INT
		1099DIV
		1099MISC
		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

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

YES	NO	
		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?

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2010 TAX QUESTIONS

AT ANY TIME DURING 2010:

Did you or your spouse

YES	NO	
		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 2009?
		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? ☐ Roth? ☐ or Simple retirement plan?
		Get claimed (or were eligible to be claimed) as a dependent on anyone else's return?

YES	NO	
		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 bring 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 2010 or keep receipts on all sales tax items purchased in 2010?
		Were there any births, adoptions, divorces, marriages, or deaths in your household?
		Do you desire direct deposit? If yes, please attach voided check.

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