

Information Sheet - 2011

Personal

Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Date of Birth(s): Taxpayer \_\_\_\_\_

Spouse \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Dependents	_____	DOB _____	SSN _____
	_____	DOB _____	SSN _____
	_____	DOB _____	SSN _____

Did any dependent have earned income?

Which one(s) and how much?

Have you claimed an exemption for a dependent due to a divorce decree authorization on someone who does not live with you?

Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Does the taxpayer (or spouse) have education expenses? Dependents?

Name \_\_\_\_\_ Amount \_\_\_\_\_

Income Questions - 2011

1. What is your current income situation (Wage Earner, Self-employed, retired, etc) and have you received the documents for 2011's earnings?

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2. If you own a small business, do you have the year-end financials completed to proceed with the tax return?

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3. If you are retired from your main employer, what is the nature of your income?

Pension \_\_\_\_\_

IRA \_\_\_\_\_

Soc Sec \_\_\_\_\_

Part-time job \_\_\_\_\_

3. Were you unemployed at any time during 2011 and did you collect any UI benefits?

4. Do you own any rental properties and did you collect rental income during 2011?

5. Do you own investments in stock, bonds, mutual funds, etc. for which you collect dividends , capital gain income, or interest from bank accounts?

6. Were you disabled during 2011 and did you collect any disability benefits?

7. Do you own a farm and did you receive any farm income?

8. Did you sell any property such as land or a house in 2011?
9. Did you receive any other income such as lottery and gambling winnings?
10. Are you divorced and do you receive or pay any alimony from/to your former spouse?

Please provide any additional information below on your income situation which has not been addressed in the previous questions:

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Expenses:

1. Do you own a home?
2. Did you have medical expenses in 2011 which included medical insurance premiums along with other costs (medical procedures, co-pays, doctor visits, medical mileage, etc)? If so, would the total amount of these costs surpass 7.5% of your adjusted gross income?
3. Do you own other property such as land, other home, etc for which you paid property taxes on?
4. Did you contribute to charities in 2011 (cash or property)
5. Do you have expenses relating to your work which were not reimbursed by your employer?
6. Do you have cars and trucks for which you paid the renewal tab fee in 2011 that includes a registration tax?
7. Do you pay interest on student loans or tuition (and other education expenses) for yourself, spouse, or dependents?

Please provide any information below on your expenses which has not been addressed in the previous questions:

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Other important information:

1. Did you contribute to an IRA or Self-employed retirement plan in 2011?
2. Did you make estimated tax payments in 2011?
3. Were there any extraordinary items that occurred in 2011 (unlike past years)?
  - a. Divorce
  - b. New baby
  - c. Married
  - d. Extraordinary medical expenses due to hospitalization, severe illness, accident
  - e. Inheritance
  - f. Disability
  - g. Open or closed a business
  - h. Death

Comments:

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## Documentation

1. Wages - W2s
2. Interest , dividends, capital gains - 1099s
3. Independent contractor work - 1099
4. Partnership income - K1
5. S-Corp income - K1
6. Mortgage Interest - 1098
7. Charities - notices from charities on cash donations; property donations - items donated, cost of items, when obtained, how they were obtained, and value at time of donation.
8. Mileage log - for business miles driven (beginning and ending odometer readings, Car type, when it was first use); medical mileage (to and from clinics, etc); charitable miles (to donation centers, volunteer work)
9. Retirement plans - 1099Rs
10. Social Security - statement from SSA
11. Gambling winnings - 1099
12. Unemployment Benefits - 1099G

## Important dates - 2012

Jan 17 - 4th Quarter estimated tax payment due (2011)

Jan 31 - should receive 1099s and W2s by this date

Mar 15 - tax returns due for Partnerships and Scorps

Mar 15 - Partnership & Scorp extension is due

Apr 17 - Individual returns due

Apr 17 - 1st quarter of 2012 estimated payments due

Apr 17 - Individual tax extension due

June 15 - 2nd quarter of 2012 estimated payments due

Sept 15 - if filed extension as partnership or S-corp, is due

Sept 15 - 3rd quarter of 2012 estimated tax payments due

Jan 15, 2013 - 4th quarter of 2012 estimated tax payments due