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Tax Organizer - Checklist & Questions *(on page 2)*

This page will assist you in compiling the necessary information to prepare your tax return accurately and to assure that all income, credits and allowable deductions are accounted for. **Please check all items that apply to you and include this form and all supporting documents with your tax preparation information.** This listing is a summary of the most common tax information. If you have an item in question, bring it with you so it can be reviewed. Don't hesitate to call us with questions this listing may have raised.

INCOME:

- Wages/salaries (W-2 forms & last pay stub)
- Alimony (NOT Child Support)
- Jury duty or other public service
- Tips/gratuities (not reported on W-2)
- Profit sharing distributions (1099-R)
- Partnerships/estates/trust (K-1)
- Business/self-employed (furnish schedule)
- Rental (furnish schedule or details)
- Social security income (SSA-1099)
- Dividend income (1099-DIV)
- Sale of personal residence (1099-S)
 - 1. Date old house acquired 2. Cost or basis 3. Closing document on sale
 - NEW RESIDENCE: 4. Closing document on new purchase
- Child support/payments/assistance
- Veterans benefits/disability income
- Other 1099's (A, H, LTC, OID, Q, SA)
- Contest/awards/gambling winnings (1099-Misc/1099-G)
- Commissions/bonuses (not on W-2)
- Pensions/annuities (1099-R)
- IRA/Keogh/Roth IRA rollovers, inheritance (1099-R)
- Unemployment compensation (1099-G)
- S-Corporation income (K-1)
- Farm (furnish schedule or details)
- Other (1099-Misc &/or explanation of income)
- Interest income (1099-INT)
- Capital gains and losses (1099-B)
 - 1. Description 2. Date acquired 3. Date sold 4. Sale price
 - 5. Basis (purchase statement and all capital-gain statements since the purchase)
- Prior year state income tax refund (1099-G).
- Debt forgiveness (1099-C)
- Miscellaneous income
- Workmen's compensation/loss of time payment
- Dependent Child's (under age 18) investment income

ITEMIZED DEDUCTIONS, CREDITS AND ADJUSTMENTS TO INCOME:

- Medical, drugs, medicines, dental, eyes
- Other medical & mileage
- Personal property tax
 - (bring auto registration paid during tax year)
- Mortgage interest - (Form 1098)
- Home equity loan - (Form 1098)
- * Contributions - Church & other Charity
- * Non-cash contributions (Desc & value of each)
- Miscellaneous (tax prep fees, union dues, uniforms & upkeep, tools/shoes/glasses, safe deposit box, publications)
- Alimony Pd
- Educational Expenses
- IRA/Keogh/SEP retirement contributions
- Employee business expenses
 - 1. Vehicle mileage detail 2. Vehicle expenses
 - 3. Travel expenses 4. Meals/entertainment
 - 5. Other business expense
- Mortgage Insurance Premiums
- Medical insurance paid by you
- Real estate taxes (even if you don't itemize)
- State income tax pd (on W-2 & estimated)
- Points Pd (refi/home purchase-need closing docs)
- Volunteer work-mileage, expenses paid
- Casualty/theft losses
- Moving expense (Job change)
- Child/dependent care
 - (W-10 from provider; or name, Soc Sec. # or tax ID #, address, and amount pd)
- Investment Expense
- Sales tax on large items (car, boat, airplane) (even if you don't itemize)
- Gambling losses
- College tuition paid (form 1098-T)
- College loan repayments (form 1098-E)
- HSA/MSA contributions & payments received
- Teacher's supplies up to \$250 - bring receipts
- Hybrid/alternative fuel vehicle credits. (Bring your purchase invoice.)
- Energy credits for some home improvements. (Certification required from supplier.)
- Did you purchase a new principle residence in 2009? (Bring your settlement statement.)
- Federal & State estimated taxes paid during and for the tax year. (Dates paid & amounts.)

Please provide your current e-mail address: _____

ADDITIONAL ITEMS FOR FIRST TIME FILERS WITH ATS:

- Personal information for all family members - Full names, birthdates, SS # (Names and SS # - must match Social Security cards).
- Copy of last year's tax return.

* Per IRS regulations, charitable contributions now require a receipt from the organization for amounts over \$250 and all amounts under \$250 require a receipt or your canceled check. Please include these documents with your tax information.

QUESTIONS

Personal Information

- | | YES | NO |
|--|--------------------------|--------------------------|
| Did your marital status change during the year? If yes, from: _____ to: _____. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did your address change from last year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Can you be claimed as a dependent by another taxpayer? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you change any bank accounts that were used on last years return? | <input type="checkbox"/> | <input type="checkbox"/> |
| Were there any changes in dependents from the prior year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have children under 19 or student under 24 with unearned income > \$1900? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you provide over half the support for any other person(s) during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay for child care while you worked or looked for work? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any expenses related to the adoption of a child during the year? | <input type="checkbox"/> | <input type="checkbox"/> |

Purchases, Sales and Debt Information

- | | | |
|---|--------------------------|--------------------------|
| Did you start a new business or purchase rental property during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire a new or additional interest in a partnership or S corporation? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell, exchange, or purchase any real estate during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you foreclose or abandon any real estate during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire or dispose of any stock during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you take out a home equity loan this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you refinance a principal residence or second home this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell an existing business, rental, or other property this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you incur any non-business bad debts this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any debts canceled or forgiven this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you purchase a new hybrid or alternative motor vehicle this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any student loan interest this year? | <input type="checkbox"/> | <input type="checkbox"/> |

Income Information

- | | | |
|--|--------------------------|--------------------------|
| Did you have any foreign income or pay any foreign taxes during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any income from property sold prior to this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive a lump-sum payment from a pension, profit sharing or 401(k) plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any withdrawals from an education savings or 529 Plan account? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did any of your life insurance policies mature, or did you surrender any policies? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you cash any Series EE or I U.S. Savings bonds issued after 1989? | <input type="checkbox"/> | <input type="checkbox"/> |

Itemized Deduction Information

- | | | |
|---|--------------------------|--------------------------|
| Did you incur a casualty or theft loss during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have an expense account or allowance during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you use your car on the job, for other than commuting? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you work out of town for part of the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any expenses related to seeking a new job during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you rmake any major purchases during the year (cars, boats, etc.)? | <input type="checkbox"/> | <input type="checkbox"/> |

Miscellaneous Information

- | | | |
|---|--------------------------|--------------------------|
| Did you make gifts of more than \$13,000 to any individual? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any contributions to an education savings or 529 Plan account? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay long-term care (nursing home) premiums for yourself or your family? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any COBRA health care coverage continuation premiums? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you engage in any bartering transactions? | <input type="checkbox"/> | <input type="checkbox"/> |
| Are you or your spouse active participants or covered by a pension or retirement plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you retire or change jobs this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you incur moving costs because of a job change? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did any family members attend a post-secondary school during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay an individual as a household employee during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make energy efficient improvements to your main home this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Were you a grantor or transferor for a foreign trust, or do you have an interest in any financial account in a foreign country? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive correspondence from the State or the Internal Revenue Service? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you want to designate \$3 to the Presidential Election Campaign Fund? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay state and/or local real estate property taxes this year? | <input type="checkbox"/> | <input type="checkbox"/> |

- | | | |
|--|--------------------------|--------------------------|
| Did you review the Tax Organizer Checklist for income & deductions? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

Accounting & Tax Solutions, Inc.

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