



This Tax Organizer is designed to help you collect and report the information needed to prepare your 2010 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2010 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2009 information is included for your reference. You do not need to make any 2009 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- A copy of your 2009 tax return (if not in our possession).
- Original Form(s) W-2.
- Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- Copies of other compensation or pension documentation, such as Form 1099-MISC or Form 1099-R.
- Form(s) 1099 or statements reporting dividend and interest income.
- Brokerage statements showing transactions for stocks, bonds, etc.
- Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

# 2010 TAX ORGANIZER

Taxpayer Information	Spouse Information
Last name .....	Last name .....
First name .....	First name .....
Middle Initial .....	Middle Initial .....
Suffix .....	Suffix .....
Social security number .....	Social security number .....
Date of birth .....	Date of birth .....
Occupation .....	Occupation .....
Work phone.....	Work phone.....
Ext ..	Ext ..
Cell phone .....	Cell phone .....
E-mail address .....	E-mail address .....
Address .....	Apartment number .....
City .....	State .....
	ZIP Code .....
Home phone .....	Fax number .....

Dependent Information					
First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense
-----					
-----					
-----					
-----					
-----					

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid
-----	-----		
-----	-----		
-----	-----		
-----	-----		

Education Tuition and Fees				
Student First Name	MI	Suffix	Student Last Name	Social Security Number
-----			-----	
-----			-----	
-----			-----	

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid
Enter total 2010 qualified student loan interest .....

**Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation**

Employer Name	2009 Amount
_____	_____
_____	_____
_____	_____

**Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc**

1099-R Payer Name	2009 Amount
_____	_____
_____	_____
_____	_____

**Attach Form(s) SSA-1099 – Social Security/Railroad Benefits**

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099.....	_____	_____
Railroad Retirement Benefits from Form RRB-1099.....	_____	_____
Medicare B premiums withheld.....	_____	_____
Medicare D premiums withheld.....	_____	_____

**Attach Form(s) 1099-MISC – Miscellaneous Income**

1099-MISC Payer Name
_____
_____
_____

**Attach Form(s) 1099-INT – Interest Income**

1099-INT Payer Name	2009 Amount
_____	_____
_____	_____
_____	_____
_____	_____

**Attach Form(s) 1099-DIV – Dividend Income**

1099-DIV Payer Name	2009 Amount
_____	_____
_____	_____
_____	_____
_____	_____

**Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc**  
 Attach all stock sale transaction information, including initial cost information.

**Other Government Forms to attach:**  
 Form(s) 1099-G – Certain Government Payments, Schedule K-1s– Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G– Gambling or Lottery Winnings, Form(s) 1099-Q– Payments from Qualified Education Programs

**Other Income:**  
 Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

**Retirement Plan Contributions**

	Taxpayer	Spouse
Traditional IRA contributions made for 2010.....	_____	_____
Roth IRA contributions made for 2010.....	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions.....	_____	_____

Yes No

- 1 Did you receive an economic stimulus payment in 2010? .....    
 You may have received this payment in 2010 if you did not receive a payment in 2009 and you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits in November or December 2008, or January 2009. Report the amount here .....
- 2 Did a lender cancel any of your debt in 2010? (Attach any Forms 1099-A or 1099-C) .....
- 3 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2010? **yes**, please attach details .....
- 4 Did you purchase a motor vehicle or boat during 2010? .....    
 If **yes**, attach documentation showing sales tax paid.
- 5 Did you purchase a hybrid vehicle in 2010? If **yes**, enter year, make, model, and date purchased: .....
- 6 Did you donate a vehicle in 2010? If **yes**, attach Form 1098C .....
- 7 What was the sales tax rate in your locality in 2010? ..... % State ID .....
- 8 Did your marital status change during 2010? .....    
 If **yes**, explain: .....
- 9 Were you or your spouse permanently and totally disabled in 2010? .....
- 10 Do you have dependents who must file? .....
- 11 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$1900? ..
- 12 Did you provide over half the support for any other person during 2010? .....
- 13 Did you incur adoption expenses during 2010? .....
- 14 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? .....
- 15 Did you receive any disability payments in 2010? .....
- 16 Did you receive tip income **not** reported to your employer? .....
- 17a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2010? **yes**, attach closing or escrow statements, 1099-C or 1099-A forms .....
- b Did you enter into a binding contract to purchase a new home by April 30, 2010? .....
- c If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it? .....
- 18 Did you incur any casualty or theft losses during 2010? .....
- 19 Did you incur any non-business bad debts? .....
- 20 Did you pay any individual for domestic services in 2010? .....
- 21 Did you buy or sell any stocks or bonds in 2010? .....
- 22 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? ..
- 23 Did you incur any moving expenses? If **yes**, attach details .....
- 24 Did you or your spouse elect continuation of COBRA coverage after your employment was involuntary terminated? .....
- 25 Did you receive any income not included in this Tax Organizer? .....    
 If **yes**, please attach information.
- 26 Do you expect your income and deductions in 2011 to be the same as 2010? .....    
 If **no**, attach explanation of changes expected.
- 27 If you paid any alimony, enter recipient's SSN: ..... Alimony paid: .....
- 28 Enter your state of residence ..... Taxpayer ..... Spouse .....

**Electronic Filing and Direct Deposit of Refund**

Yes No

- If your tax return is eligible for Electronic Filing, would you like to file electronically? .....
- The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. ....
- If you receive a refund, would you like direct deposit? .....
- If **yes**, please provide a voided check (not a deposit slip) if your bank account information has changed.
- What type of account is this? ..... Checking  Savings

**Estimated Tax Paid**

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

**Additional Information** (Enter any additional information here and attach any documents.)

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# General Questions

ORG3

## PERSONAL INFORMATION

	Yes	No
1 Did your marital status change during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , explain .....		
2 Do you want to allow your tax preparer to discuss this year's return with the IRS? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>no</b> , enter another person (if desired) to be allowed to discuss this return with the IRS. <b>Caution:</b> Review any transferred information for accuracy.		
Designee's Name .... ▶		
Phone Number ..... ▶		
Personal Identification Number (5 digit PIN) .... ▶		
3 Do you or your spouse plan to retire in 2011? .....	<input type="checkbox"/>	<input type="checkbox"/>
4 Were you or your spouse permanently and totally disabled in 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
5 Enter date of death for taxpayer or spouse (if during 2010 or 2011): Taxpayer: _____ Spouse: _____		
6 Were you or your spouse a member of the U.S. Armed Forces during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>

## DEPENDENT INFORMATION

	Yes	No
7a Do you have dependents who must file? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If <b>yes</b> , do you want us to prepare the return(s)? .....	<input type="checkbox"/>	<input type="checkbox"/>
8a Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$1,900? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If <b>yes</b> , do you want to include your child's income on your return? .....	<input type="checkbox"/>	<input type="checkbox"/>
9 Are any of your dependents <b>not</b> U.S. citizens or residents? .....	<input type="checkbox"/>	<input type="checkbox"/>
10 Did you provide over half the support for any other person during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you incur adoption expenses during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>

## IRA, PENSION, AND EDUCATION SAVINGS PLANS

	Yes	No
12 Did you receive payments from a pension or profit-sharing plan? .....	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? .....	<input type="checkbox"/>	<input type="checkbox"/>
14a Did you convert all or part of a regular IRA into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
b Did you roll over all or part of a qualified plan into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you contribute to a Coverdell Education Savings Account? .....	<input type="checkbox"/>	<input type="checkbox"/>

## ITEMS DEDUCTIBLE TO INCOME TAXES

	Yes	No
16 Did you receive any disability payments in 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you receive tip income <b>not</b> reported to your employer? .....	<input type="checkbox"/>	<input type="checkbox"/>
18a Did you buy, sell, refinance, or abandon a principal residence or other real property in 2010? (Attach copies of any escrow statements or Forms 1099.) .....	<input type="checkbox"/>	<input type="checkbox"/>
b Did you enter into a binding contract to purchase a new home by April 30, 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
c If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home? .....	<input type="checkbox"/>	<input type="checkbox"/>
d Are you planning to purchase a home soon? .....	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you incur any casualty or theft losses during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you incur any non-business bad debts? .....	<input type="checkbox"/>	<input type="checkbox"/>

## PRIOR YEAR TAX RETURN

	Yes	No
21 Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , enclose agent's report or notice of change.		
22 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return? .....	<input type="checkbox"/>	<input type="checkbox"/>

General Questions (continued)

ORG3

FOREIGN BANK ACCOUNTS AND TAXES

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| 23 Did you have foreign income or pay any foreign taxes in 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 24a At any time during the tax year, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
| b Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2010? Report all interest income on Org 11 .....                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 25 Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust? .....             | <input type="checkbox"/> | <input type="checkbox"/> |

HEALTH AND LIFE INSURANCE

- |   | Yes                      | No                       |
|---|--------------------------|--------------------------|
| 26 Did you or your spouse have self-employed health insurance? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 27 If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job? .....      | <input type="checkbox"/> | <input type="checkbox"/> |
| 28 Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 29 Did you contribute to or receive distributions from a Health Savings Account (HSA)? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 30 Did you or your spouse elect continuation of COBRA coverage after your employment was involuntarily terminated? .....                      | <input type="checkbox"/> | <input type="checkbox"/> |

MISCELLANEOUS

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| 31 Did you receive an economic stimulus payment in 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| You may have received this payment in 2010 if you did not receive a payment in 2009 and you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits in November or December 2008, or January 2009. Report the amount here ..... |                          |                          |
| 32 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2010? <b>If yes,</b> please attach details .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 33 Did you start paying mortgage insurance premiums in 2010? <b>If yes,</b> please attach details .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 34 Did you purchase a motor vehicle or boat during 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>If yes,</b> attach documentation showing sales tax paid.  |                          |                          |
| 35 Did you purchase a hybrid vehicle in 2010? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>If yes,</b> enter year, make, model, and date purchased: .....  |                          |                          |
| 36 Did you donate a vehicle in 2010? <b>If yes,</b> attach Form 1098C .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 37 What was the sales tax rate in your locality in 2010? _____ % State ID .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 38 Did you or your spouse make gifts of over \$13,000 to an individual or contribute to a prepaid tuition plan? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 39 Did you make gifts to a trust? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 40 If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>If yes,</b> please attach details.  |                          |                          |
| 41 Did you or your spouse participate in a medical savings account in 2010? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>If yes,</b> please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)  |                          |                          |
| 42 Did you make a loan at an interest rate below market rate? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 43 Did you pay any individual for domestic services in 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 44 Did you pay interest on a student loan for yourself, your spouse, or your dependents? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 45 Did you, your spouse, or your dependents attend post-secondary school in 2010? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 46 Did a lender cancel any of your debt in 2010? (Attach any Forms 1099-A or 1099-C) .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 47 Did you receive any income not included in this Tax Organizer? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>If yes,</b> please attach information.  |                          |                          |

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| 48 If your tax return is eligible for Electronic Filing, would you like to file electronically? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 49 The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit? ..... | <input type="checkbox"/> | <input type="checkbox"/> |

**Caution:** Review transferred information for accuracy.

- 50 **If yes,** please provide the following information:
- a Name of your financial institution .....
- b Routing Transit Number (must begin with 01 through 12 or 21 through 32) .....
- c Account number .....
- d What type of account is this? .....
- Checking  Savings

Please attach a **voided** check (not a deposit slip) if your bank account information has changed.