General: 1040

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) ___

Mark if you were married but living apart all year ___ Mark if your nonresident alien spouse does not have an ITIN ___

	Taxpayer	Spouse
Social security number	___	___
First name	___	___
Last name	___	___
Occupation	___	___
Designate $3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3=Blank)	___	___
Mark if legally blind	___	___
Mark if dependent of another taxpayer	___	___
Taxpayer between 19 and 23, full-time student, with income less than 1/2 support? (Y, N)	___	
Date of birth	___	___
Date of death	___	___
Work/daytime telephone number/ext number	___ ___	___ ___
Do you authorize us to discuss your return with the IRS (Y, N)	___	

General: 1040, Contact

Present Mailing Address

Address ___

Apartment number ___

City/State postal code/Zip code ___ ___ ___

Foreign country name ___

Home/evening telephone number ___

Taxpayer email address ___

Spouse email address ___

General: 1040

Dependent Information

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months in home	Care expenses paid for dependent

Credits: 2441

Child and Dependent Care Expenses

	Provider #1	Provider #2
Provider information:		
Name	___	___
Street address	___	___
City, state, and zip code	___	___
Social security number OR Employer identification number	___	___
Tax Exempt or Living Abroad Foreign Care Provider (1 = TE, 2 = LAFCP)	___	___
Amount paid to care provider in 2011	___	___

	Taxpayer	Spouse
Employer-provided dependent care benefits that were forfeited	___	___

General: Info

Direct Deposit/Electronic Funds Withdrawal Information

If you would like to have a refund deposited directly or a balance due debited directly into/from your bank account, please enter the following information:

Financial institution: Routing transit number ___ Name ___

Your account number ___ Type of account (1 = Savings, 2 = Checking, 3 = IRA*) ___

If you would like to use a refund to purchase U.S. Series I Savings bonds (in increments of $50), enter a maximum amount up to $5,000.** ___

*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts. Make sure direct deposits will be accepted by the bank or financial institution.

**To purchase U.S. Series I Savings bonds in someone else's name, please contact our office.

Income: W2

Salary and Wages

Please provide all copies of Form W-2 that you receive.
Below is a list of the Form(s) W-2 as reported in last year's tax return. If a particular W-2 no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Income: 1099R

Pension, IRA, and Annuity Distributions

Please provide all copies of Form 1099-R that you receive.
Below is a list of the Form(s) 1099-R as reported in last year's tax return. If a particular 1099-R no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Income: K1, K1T

Schedules K-1

Please provide all copies of Schedule K-1 that you receive.
Below is a list of the Schedule(s) K-1 as reported in last year's tax return. If a particular K-1 no longer applies, mark the not applicable box.

T/S/J	Description	Form	Mark if no longer applicable

Income: W2G

Gambling Income

Please provide all copies of Form W-2G that you receive.
Below is a list of the Form(s) W-2G as reported in last year's tax return. If a particular W-2G no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Educate: 1099Q

Qualified Education Plan Distributions

Please provide all copies of Form 1099-Q that you receive.
Below is a list of the Form(s) 1099-Q as reported in last year's tax return. If a particular 1099-Q no longer applies, mark the not applicable box.

T/S	Description	Prior Year Information	Mark if no longer applicable

Income Summary

Below is a list of the forms as reported in last year's tax return. Please provide copies of all of the forms you received. To indicate which forms are attached, enter a "1" for attached in the field provided next to the Description. To indicate which forms are not applicable, enter a "2" for not applicable (N/A) in the field provided next to the Description. Otherwise, leave this field blank.

Form	T/S/J	Description	1 = Attached 2 = N/A

Income: B1

Interest Income

Please provide all copies of Form 1099-INT.

T/S/J	Payer Name	Interest Income	Prior Year Information

Income: B3

Seller Financed Mortgage Interest

T, S, J ___ Payer's name ___

Payer's address ___ Payer's social security number ___

Amount received in 2011 ___ Amount received in 2010 ___

Income: B2

Dividend Income

Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

T/S/J	Payer Name	Ordinary Dividends	Qualified Dividends	Prior Year Information

Income: D

Sales of Stocks, Securities, and Other Investment Property

Please provide copies of all Forms 1099-B and 1099-S.

T/S/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basis

Income: Income

Other Income

Please provide copies of all supporting documentation.

	2011 Information		Prior Year Information
State and local income tax refunds			
	Taxpayer	**Spouse**	**Prior Year Information**
Alimony received			
Unemployment compensation			
Unemployment compensation repaid			
Social security benefits			
Medicare premiums to be reported on Schedule A			
Railroad retirement benefits			

T/S/J	Other Income:	2011 Information	Prior Year Information

1040 Adj: IRA

Adjustments to Income - IRA Contributions

Please provide year end statements for each account and any Form 8606 not prepared by this office.

	Taxpayer	Spouse
Traditional IRA Contributions for 2011 -		
If you want to contribute the maximum allowable traditional IRA contribution amount, enter the applicable code: (1 = Deductible only, 2 = Both deductible and nondeductible)	___	___
Enter the total traditional IRA contributions made for use in 2011	________	________
Roth IRA Contributions for 2011 -		
Mark if you want to contribute the maximum Roth IRA contribution	___	___
Enter the total Roth IRA contributions made for use in 2011	________	________

Educate: Educate

Higher Education Deductions and/or Credits

Complete this section if you paid interest on a qualified student loan in 2011 for qualified higher education expenses for you, your spouse, or a person who was your dependent when you took out the loan.

T/S	Qualified student loan interest paid	2011 Information	Prior Year Information

Complete this section if you paid qualified education expenses for higher education costs in 2011.
Qualified education expenses include tuition and fees required for enrollment or attendance at an eligible educational institution.

Please provide all copies of Form 1098-T.

T/S	Ed Exp Code*	Student's SSN	Student's First Name	Student's Last Name	Qualified Expenses	Prior Year Information

***Education Expense Code: 1 = American opportunity credit; 2 = Lifetime learning credit; 3 = Tuition and fees deduction**
The student qualifies for the American opportunity credit when enrolled at least half-time in a program leading to a degree, certificate, or recognized credential; has not completed the first 4 years of post-secondary education; has no felony drug convictions on student's record.

1040 Adj: 3903

Job Related Moving Expenses

Complete this section if you moved to a new home because of a new principal work place.

Description of move	________
Taxpayer/Spouse/Joint (T, S, J)	___
Mark if the move was due to service in the armed forces	_
Number of miles from old home to new workplace	________
Number of miles from old home to old workplace	________
Mark if move is outside United States or its possessions	_
Transportation and storage expenses	________
Travel and lodging (not including meals)	________
Total amount reimbursed for moving expenses	________

1040 Adj: OtherAdj

Other Adjustments to Income

Alimony Paid:

T/S	Recipient name	Recipient SSN	2011 Information	Prior Year Information

Address ________ **City** ________ **State** ___ **Zip code** ________

	Taxpayer	Spouse	Prior Year Information
Educator expenses:			
Other adjustments:			

Itemized: A1

Medical and Dental Expenses

T/S/J		2011 Information	Prior Year Information
_	Medical and dental expenses	___	___
_	Medical insurance premiums you paid	___	___
_	Long-term care premiums you paid	___	___
_	Prescription medicines and drugs	___	___
_	Miles driven for medical items 1/1/11 through 6/30/11 ___ 7/1/11 through 12/31/11	___	___

Itemized: A1

Tax Expenses

T/S/J		2011 Information	Prior Year Information
_	State/local income taxes paid	___	___
_	2010 state and local income taxes paid in 2011	___	___
_	Sales tax paid on actual expenses	___	___
_	Real estate taxes paid	___	___
_	Personal property taxes	___	___
_	Other taxes	___	___

Itemized: A2

Interest Expenses

T/S/J		2011 Information	Prior Year Information
_	Home mortgage interest: From Form 1098	___	___

Other, such as: Home mortgage interest paid to individuals

T/S/J	Name	SSN	2011 Information	Prior Year Information
_	___	___	___	___

Address ___

T/S/J		2011 Information	Prior Year Information
_	Investment interest expense, other than on K-1s:	___	___

Refinancing Information:

	Refinance #1	Refinance #2
T/S/J	_	_
Description	___	___
Total points paid	___	___
Date of refinance	___	___
Total number of payments	___	___
Reported on Form 1098 in 2011	___	___

Itemized: A3

Charitable Contributions

T/S/J		2011 Information	Prior Year Information
_	Contributions made by cash or check	___	___
_	Volunteer miles driven	___	___
_	Noncash items, such as: Goodwill, Salvation Army	___	___

Itemized: A3

Miscellaneous Deductions

T/S/J		2011 Information	Prior Year Information
_	Unreimbursed expenses	___	___
_	Union dues	___	___
_	Tax preparation fees	___	___
	Other expenses, subject to 2% AGI limitation:		
_	___	___	___
_	___	___	___
_	Safe deposit box rental	___	___
_	Investment expenses, other than on K1s:	___	___
	Other expenses, not subject to the 2% AGI limitation:		
_	___	___	___
_	Gambling losses: (Enter only if you have gambling income)	___	___