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**INDIVIDUAL TAX ORGANIZER (1040)**

**If we did not prepare your prior year returns, provide a copy of federal and state returns for the previous year.**

Taxpayer's Name \_\_\_\_\_ SSN \_\_\_\_\_ Occupation \_\_\_\_\_

Spouse's Name \_\_\_\_\_ SSN \_\_\_\_\_ Occupation \_\_\_\_\_

Home Address \_\_\_\_\_

City, Town or Post Office                      Country                      State      Zip Code                      School District

Telephone Number                      Telephone Number (Taxpayer)                      Telephone Number (Spouse)

Home ( ) \_\_\_\_\_                      Office ( ) \_\_\_\_\_                      Office ( ) \_\_\_\_\_

Email (T) \_\_\_\_\_                      Fax ( ) \_\_\_\_\_                      Fax ( ) \_\_\_\_\_

Email (S) \_\_\_\_\_                      Cell ( ) \_\_\_\_\_                      Cell ( ) \_\_\_\_\_

Taxpayer: Date of Birth \_\_\_\_\_

Spouse : Date of Birth \_\_\_\_\_

**Dependent Children Who lived With You:**

Full Name	Social Security Number	Relationship	Birth Date
1)			
2)			
3)			
4)			
5)			
6)			
7)			

**Other Dependents:**

Full Name	Social Security Number	Relationship	Birth Date	Number Months Resided in Your Home	% Support Furnished By You
8)					
9)					
10)					

2011	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2011, please check the appropriate box and provide additional information if necessary.

**PERSONAL INFORMATION**

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year?                              |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year?                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2011? |

**DEPENDENTS**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2011?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2011, with interest and dividend income in excess of \$900, or total investment income in excess of \$1,800? |

**INCOME**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes?  |

**PURCHASES, SALES AND DEBT**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? If yes, list the description, related business or activity, date placed in service, and cost of basis on an attached schedule. <b>PLEASE INCLUDE A COPY OF HUD 1 SETTLEMENT STATEMENT FOR PURCHASES OF REAL ESTATE.</b> |

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- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property in 2011?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2012?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? <b>PLEASE INCLUDE A COPY OF HUD 1 SETTLEMENT STATEMENT.</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did anyone owe you money which had become uncollectible?   |

**RETIREMENT PLANS**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?      |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another retirement plan?            |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?                      |

**EDUCATION**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any expenses working as a teacher, or principal for classes kindergarten through grade 12?                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a 529 Plan? If so, which State? _____   |

**ITEMIZED DEDUCTIONS**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss because of damaged or stolen property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you work out of town for part of the year?              |

2011	1040	US	Miscellaneous Questions
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Yes	No	
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<input type="checkbox"/>	<input type="checkbox"/>	Did you use your car on the job (other than to and from work)?
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**MISCELLANEOUS**

<input type="checkbox"/>	<input type="checkbox"/>	Do you want to allocate \$3 to the Presidential Election Campaign Fund?
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<input type="checkbox"/>	<input type="checkbox"/>	Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
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<input type="checkbox"/>	<input type="checkbox"/>	May the IRS discuss this return with the preparer?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
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<input type="checkbox"/>	<input type="checkbox"/>	Was your home rented out or used for business?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you make contributions to a health savings account (HSA) this year?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you incur moving expenses due to a change of employment?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you engage the services of any household employees?
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<input type="checkbox"/>	<input type="checkbox"/>	Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you or your spouse make any gifts to an individual that total more than \$13,000, or any gifts to a trust?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you add energy efficient improvements to your home in 2011?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you make a contribution to Georgia's Qualified Education Expense Credit Program? (Ga Goal, Apogee, etc.)
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<input type="checkbox"/>	<input type="checkbox"/>	Did any eligible dependents complete a Qualified Georgia Driver's Education Program?
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2011

1040

US

Miscellaneous Questions

Yes No

- Do you expect that your refund or tax due for 2011 will differ greatly from those in years past? If so, how much? \_\_\_\_\_
- Do you want a paper copy of your return? We will be providing a copy of your return on a CD in the .pdf file format.
- Do you have a will?
- Do you have life insurance? If yes, would you like a complimentary review of your policy?
- Do you have any third parties to whom you would like us to forward your tax return? If yes, our office will contact you for proper authorization.

**STATE TAX**

Did you or your spouse receive income in a state other than your home state to which you are liable for taxes? \_\_\_\_\_

Name of State: \_\_\_\_\_

If you were not a Full Year Resident of your home state, indicate status:

\_\_\_\_\_ Non-Resident

\_\_\_\_\_ Part Year Resident from \_\_\_\_\_ to \_\_\_\_\_ If we did not prepare your 2010 State Return, please enclose a complete copy.