

Name

Date

Your Name \_\_\_\_\_  
Address \_\_\_\_\_

Preparer's  
Name \_\_\_\_\_

(subject to terms and conditions)

Name

Date

Your Name \_\_\_\_\_  
Address \_\_\_\_\_

Preparer's  
Name \_\_\_\_\_

(subject to terms and conditions)

Name

Date

Your Name \_\_\_\_\_  
Address \_\_\_\_\_

Preparer's  
Name \_\_\_\_\_

(subject to terms and conditions)

## Miscellaneous Information

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

SSN: \_\_\_\_\_

	Yes	No	General Information
			1. Were there any changes to your filing status or number of dependents during 2011?
			2. Can you or your spouse be claimed as a dependent by someone else?
			3. Did you incur any childcare expenses?
			4. Did you have a change in residence or job location during the year?
			5. Did you move during 2011? From where? _____ Date of move _____
			6. Did you reside in more than one state during 2011? If yes, which states? _____
			7. Did you receive any notices from the IRS or the state taxing agency? If yes, please attach.
			8. Would you like a copy of your tax return sent to you via email?
			9. Did you receive an Economic Recovery Payment in 2011 from social security benefits, supplemental security income, or pension benefits?

	Yes	No	Income Information
			1. Have you received all W-2s from all employers? How many W-2s are attached? _____
			2. Did you use your vehicle on the job other than for commuting to work?
			3. Did you have an employer-provided vehicle which you drove home or used personally? If so, enter the lease value. \$ _____
			4. Did you work out of town at any time during the year?
			5. Did you earn income from a state other than the state in which you live? If yes, what state and how much? _____
			6. Did you or your spouse receive any tips not reported to your (or your spouse's) employer?
			7. Did you receive any disability income during the year? \$ _____. Attach 1099-R.
			8. Did you have an interest in or signature over a bank or brokerage account in a foreign country? Were you a grantor of or transferor to a foreign trust?
			9. Did you earn interest from, or are you an authorized signature holder on, a foreign bank account?
			10. Did you have any income from, or pay taxes to, a foreign country?
			11. Did you engage in any bartering transactions during 2011?
			12. Did you surrender any U.S. Savings Bonds during 2011?
			13. Did you receive any state or local income tax refunds from prior years?
			14. Do you or your spouse have any IRA accounts?
			15. Did you recharacterize any IRAs this year?
			16. Did you or your spouse "roll over" a profit-sharing or retirement plan distribution into another plan?
			17. Did you receive a Schedule K-1 from a partnership, S corporation, or trust? If so, please attach.
			18. Did you or your spouse receive any social security benefits during the year? Attach Form(s) SSA-1099.
			19. Did you receive any type of prize, award, or gambling winnings during 2011?
			20. Did you receive any of the following: Unemployment Income, Combat Pay, Jury Duty and/or Alimony, or Maintenance Received? If so, what and how much? _____
			21. Did you receive any income not shown in this organizer? If so, please list. _____
			22. Does anyone owe you money that has become uncollectible?

Comments: \_\_\_\_\_  
 \_\_\_\_\_

## Miscellaneous Information

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

**SSN:** \_\_\_\_\_

Yes	No	<b>Business Information</b>
<input type="checkbox"/>	<input type="checkbox"/>	1. Did you start a new business or purchase any rental property during 2011?
<input type="checkbox"/>	<input type="checkbox"/>	2. Have you purchased any business assets (furniture, equipment, etc.) or converted any assets to business use? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, business use percentage, etc.
<input type="checkbox"/>	<input type="checkbox"/>	3. Did you dispose of any business assets (including real estate)? If yes, please list on an attached sheet the date removed from service, selling price and expense of sale.
<input type="checkbox"/>	<input type="checkbox"/>	4. Did you own rental property? What percentage of time did you spend managing your rentals? _____
<input type="checkbox"/>	<input type="checkbox"/>	5. Did you purchase any gasoline, diesel, or special fuels for non-highway business use?

Yes	No	<b>Other Information</b>
<input type="checkbox"/>	<input type="checkbox"/>	1. Were any tuition costs paid during 2011 (even if classes were attended in another year)?
<input type="checkbox"/>	<input type="checkbox"/>	2. Did anyone in your household attend higher education classes in 2011?
<input type="checkbox"/>	<input type="checkbox"/>	3. Did you incur a loss due to damaged or stolen property?
<input type="checkbox"/>	<input type="checkbox"/>	4. Did you purchase a home for your personal residence between April 8, 2008, and December 31, 2008 in which the First-Time Homebuyer Credit was taken on the home?
<input type="checkbox"/>	<input type="checkbox"/>	5. Did you refinance your principal home or your second home or make a home equity loan during the year? If yes, please provide all escrow, closing, and other pertinent documentation and information.
<input type="checkbox"/>	<input type="checkbox"/>	6. Did you purchase or sell a home that you used as a principal residence? If yes, please provide closing documentation.
<input type="checkbox"/>	<input type="checkbox"/>	7. If yes to question 6 was the First-Time Homebuyer Credit taken?
<input type="checkbox"/>	<input type="checkbox"/>	8. Did you make any gifts to any one person in 2011 in excess of \$13,000? If so, are you splitting this gift with your spouse?
<input type="checkbox"/>	<input type="checkbox"/>	9. Did you pay wages to any household employees (babysitter, housekeeper, nanny, etc.)?

**To itemize deductions, bring receipts and documentation for these types of expenses:**

- Prescriptions, first-aid
- State/local income taxes
- Mortgage interest
- Tax preparation fees
- Gambling losses (up to amount of winnings)
- Cash donations to charity (provide all receipts)
- Medical/Dental/Vision expenses and insurance premiums, mileage and lodging for seeking medical care (but not meals)
- Real estate and personal property taxes paid in 2011
- Unreimbursed employee/work-related expenses (if self-employed, do not include items reported on Schedule C)
- Fair market value of property donated to charity
- Purchase price of new goods donated or used in volunteer work

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

# Miscellaneous Information

Name:

SSN:

## Information to bring to your appointment:

- Driver's license & social security card (for identity verification)
- Copy of your 2010 income tax return (for comparison and review for all includible information)
- Preprinted IRS label received
- Original W-2s and other statements of income received from employers
- 1099s and other statements reporting interest/dividend/miscellaneous income
- Records of other income received (tips, self-employment, SSI, combined bank reporting statements)
- Cancelled checking/savings slip (for direct deposit/direct debit information)

Concerns to discuss with preparer: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Preparer Notes

### Miscellaneous Notes

## Personal Data

Filing Status: <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Joint <input type="checkbox"/> Married Filing Separate <input type="checkbox"/> Head of Household	
Taxpayer Name	SSN
Spouse Name	SSN
Address	Apt no.
City	State Zip
Foreign State/Province	Foreign Postal Code
Foreign Country	
Taxpayer Date of Birth	Spouse Date of Birth
Occupation	Occupation
Daytime phone: Ext:	Daytime phone: Ext:
Evening phone: Ext:	Evening phone: Ext:
Cell:	Cell:
E-mail	E-mail
<input type="checkbox"/> Full time student <input type="checkbox"/> Blind <input type="checkbox"/> Active military	<input type="checkbox"/> Full time student <input type="checkbox"/> Blind <input type="checkbox"/> Active military
Do you want \$3 to go to the Presidential Election Camp Fund? <input type="checkbox"/>	Does your spouse want \$3 to go to the Presidential Election Camp Fund? <input type="checkbox"/>
Date and time of this year's appointment	

### Income Taxes Paid

<b>Federal</b>	2011 estimate date due	2011 est amount	Amount paid	Date paid	Check no.
2010 Refund	April 18, 2011				
2010 Refund applied to 2011	June 15, 2011				
2010 Balance Due	Sept. 15, 2011				
	Jan. 17, 2012				
Amount paid	Date paid	Check no.	Amount paid	Date paid	Check no.
Additional payments made					

<b>Resident State</b>	2011 estimate date due	2011 est amount	Amount paid	Date paid	Check no.
2010 Refund	April 18, 2011				
2010 Refund applied to 2011	June 15, 2011				
2010 Balance Due	Sept. 15, 2011				
	Jan. 17, 2012				
Amount paid	Date paid	Check no.	Amount paid	Date paid	Check no.
Additional payments made					

<b>Local</b>	2011 estimate date due	2011 est amount	Amount paid	Date paid	Check no.
2010 Refund	April 18, 2011				
2010 Refund applied to 2011	June 15, 2011				
2010 Balance Due	Sept. 15, 2011				
	Jan. 17, 2012				
Amount paid	Date paid	Check no.	Amount paid	Date paid	Check no.
Additional payments made					

# Dependents

<b>Name:</b>					<b>SSN:</b>				
First name/MI			Last name			Suffix			
SSN/ITIN		Relationship		Number of months lived with you					
DOB		Does this dependent have income over \$950?			2011		2010		
Child Care Credit - qualifying expenses incurred and paid in 2011									
Child Care Credit - portion of qualifying expenses provided by employer									
Education Credits - current year qualifying expenses for American Opportunity Credit									
Education Credits - current year qualifying expenses for Lifetime Learning Credit									
First name/MI			Last name			Suffix			
SSN/ITIN		Relationship		Number of months lived with you					
DOB		Does this dependent have income over \$950?			2011		2010		
Child Care Credit - qualifying expenses incurred and paid in 2011									
Child Care Credit - portion of qualifying expenses provided by employer									
Education Credits - current year qualifying expenses for American Opportunity Credit									
Education Credits - current year qualifying expenses for Lifetime Learning Credit									
First name/MI			Last name			Suffix			
SSN/ITIN		Relationship		Number of months lived with you					
DOB		Does this dependent have income over \$950?			2011		2010		
Child Care Credit - qualifying expenses incurred and paid in 2011									
Child Care Credit - portion of qualifying expenses provided by employer									
Education Credits - current year qualifying expenses for American Opportunity Credit									
Education Credits - current year qualifying expenses for Lifetime Learning Credit									
First name/MI			Last name			Suffix			
SSN/ITIN		Relationship		Number of months lived with you					
DOB		Does this dependent have income over \$950?			2011		2010		
Child Care Credit - qualifying expenses incurred and paid in 2011									
Child Care Credit - portion of qualifying expenses provided by employer									
Education Credits - current year qualifying expenses for American Opportunity Credit									
Education Credits - current year qualifying expenses for Lifetime Learning Credit									
First name/MI			Last name			Suffix			
SSN/ITIN		Relationship		Number of months lived with you					
DOB		Does this dependent have income over \$950?			2011		2010		
Child Care Credit - qualifying expenses incurred and paid in 2011									
Child Care Credit - portion of qualifying expenses provided by employer									
Education Credits - current year qualifying expenses for American Opportunity Credit									
Education Credits - current year qualifying expenses for Lifetime Learning Credit									

## Child & Dependent Care

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

Child Care Provider's Social Security Number or Employer ID Number \_\_\_\_\_

Child Care Provider's Name \_\_\_\_\_

Child Care Provider's Address \_\_\_\_\_

Child Care Provider's City State Zip \_\_\_\_\_ Child Care Provider's Phone \_\_\_\_\_

Amount Paid in 2011 \_\_\_\_\_ Amount Paid in 2010 \_\_\_\_\_

Child Care Provider's Social Security Number or Employer ID Number \_\_\_\_\_

Child Care Provider's Name \_\_\_\_\_

Child Care Provider's Address \_\_\_\_\_

Child Care Provider's City State Zip \_\_\_\_\_ Child Care Provider's Phone \_\_\_\_\_

Amount Paid in 2011 \_\_\_\_\_ Amount Paid in 2010 \_\_\_\_\_

Child Care Provider's Social Security Number or Employer ID Number \_\_\_\_\_

Child Care Provider's Name \_\_\_\_\_

Child Care Provider's Address \_\_\_\_\_

Child Care Provider's City State Zip \_\_\_\_\_ Child Care Provider's Phone \_\_\_\_\_

Amount Paid in 2011 \_\_\_\_\_ Amount Paid in 2010 \_\_\_\_\_

Child Care Provider's Social Security Number or Employer ID Number \_\_\_\_\_

Child Care Provider's Name \_\_\_\_\_

Child Care Provider's Address \_\_\_\_\_

Child Care Provider's City State Zip \_\_\_\_\_ Child Care Provider's Phone \_\_\_\_\_

Amount Paid in 2011 \_\_\_\_\_ Amount Paid in 2010 \_\_\_\_\_

Child Care Provider's Social Security Number or Employer ID Number \_\_\_\_\_

Child Care Provider's Name \_\_\_\_\_

Child Care Provider's Address \_\_\_\_\_

Child Care Provider's City State Zip \_\_\_\_\_ Child Care Provider's Phone \_\_\_\_\_

Amount Paid in 2011 \_\_\_\_\_ Amount Paid in 2010 \_\_\_\_\_

Child Care Provider's Social Security Number or Employer ID Number \_\_\_\_\_

Child Care Provider's Name \_\_\_\_\_

Child Care Provider's Address \_\_\_\_\_

Child Care Provider's City State Zip \_\_\_\_\_ Child Care Provider's Phone \_\_\_\_\_

Amount Paid in 2011 \_\_\_\_\_ Amount Paid in 2010 \_\_\_\_\_

# Wages and Salaries

Please attach all W-2(s).

**Name:**

**SSN:**

TS		Federal I.D. No.		Company Name					
		State I.D. No.							
Federal wages		2011		2010		Federal tax	2011		2010
	State wages	2011		2010		State tax	2011		2010
	Locality	2011		2010		Local tax	2011		2010

TS		Federal I.D. No.		Company Name					
		State I.D. No.							
Federal wages		2011		2010		Federal tax	2011		2010
	State wages	2011		2010		State tax	2011		2010
	Locality	2011		2010		Local tax	2011		2010

TS		Federal I.D. No.		Company Name					
		State I.D. No.							
Federal wages		2011		2010		Federal tax	2011		2010
	State wages	2011		2010		State tax	2011		2010
	Locality	2011		2010		Local tax	2011		2010

TS		Federal I.D. No.		Company Name					
		State I.D. No.							
Federal wages		2011		2010		Federal tax	2011		2010
	State wages	2011		2010		State tax	2011		2010
	Locality	2011		2010		Local tax	2011		2010

TS		Federal I.D. No.		Company Name					
		State I.D. No.							
Federal wages		2011		2010		Federal tax	2011		2010
	State wages	2011		2010		State tax	2011		2010
	Locality	2011		2010		Local tax	2011		2010

TS		Federal I.D. No.		Company Name					
		State I.D. No.							
Federal wages		2011		2010		Federal tax	2011		2010
	State wages	2011		2010		State tax	2011		2010
	Locality	2011		2010		Local tax	2011		2010

# Wages and Salaries

Please attach all W-2(s).

**Name:**

**SSN:**

TS  Employer's name and address: \_\_\_\_\_ Federal EIN \_\_\_\_\_

	2011	2010		2011	2010
Wages, tips, other compensation			State <input type="checkbox"/> State I.D. _____		
Federal income tax withheld			State wages		
Social Security wages			State income tax		
Social Security tax withheld			Locality name		
Medicare wages and tips			Local wages		
Medicare tax withheld			Local income tax		
Social Security tips			State <input type="checkbox"/> State I.D. _____		
Allocated tips			State wages		
Dependent care benefits			State income tax		
			Locality name		
Are you a statutory employee?	<input type="checkbox"/>	<input type="checkbox"/>	Local wages		
Are you covered by a retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax		
Did you receive third-party sick pay?	<input type="checkbox"/>	<input type="checkbox"/>			

TS  Employer's name and address: \_\_\_\_\_ Federal EIN \_\_\_\_\_

	2011	2010		2011	2010
Wages, tips, other compensation			State <input type="checkbox"/> State I.D. _____		
Federal income tax withheld			State wages		
Social Security wages			State income tax		
Social Security tax withheld			Locality name		
Medicare wages and tips			Local wages		
Medicare tax withheld			Local income tax		
Social Security tips			State <input type="checkbox"/> State I.D. _____		
Allocated tips			State wages		
Dependent care benefits			State income tax		
			Locality name		
Are you a statutory employee?	<input type="checkbox"/>	<input type="checkbox"/>	Local wages		
Are you covered by a retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax		
Did you receive third-party sick pay?	<input type="checkbox"/>	<input type="checkbox"/>			





## Profit or Loss From Business Schedule C

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

TS		Principal business or profession	Business code	
Business name		Employer I.D. number		
Business address				
Accounting method, if not cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other				
Activity type _____ You disposed of this property during 2011 <input type="checkbox"/>				
You started or acquired this business during 2011 <input type="checkbox"/>				
Did you make any payments in 2011 that would require you to file Form(s) 1099? <input type="checkbox"/> Yes <input type="checkbox"/> No				
If, Yes," did you or will you file all required Forms 1099? <input type="checkbox"/> Yes <input type="checkbox"/> No				

<b>Income</b>	<b>2011</b>	<b>2010</b>	<b>2011</b>	<b>2010</b>
---------------	-------------	-------------	-------------	-------------

Payments from Form 1099-K			Returns and allowances	
Gross receipts or sales			Other income	
Statutory Employee Earnings				

<b>Expenses</b>	<b>2011</b>	<b>2010</b>	<b>2011</b>	<b>2010</b>
-----------------	-------------	-------------	-------------	-------------

Advertising			Taxes and licenses	
Car and truck expenses			Travel	
Commissions and fees			Total meals and entertainment	
Contract labor			Utilities	
Depletion			Wages	
Employee benefit programs			Other expenses (list):	
Insurance (other than health)				
Mortgage interest (paid to banks etc.)				
Other interest				
Legal & professional services				
Office expenses				
Pension and profit sharing plans				
Rent or lease (vehicles, machinery, and equipment)				
Rent (other business property)				
Repairs and maintenance			Other (Detail)	
Supplies			Family Health Coverage	

<b>Cost of goods sold</b>	<b>2011</b>	<b>2010</b>	<b>2011</b>	<b>2010</b>
---------------------------	-------------	-------------	-------------	-------------

Inventory at beginning of the year			Materials and supplies	
Purchases (less cost of items withdrawn for personal use)			Other costs	
Cost of labor			Inventory at end of year	

Inventory method, if not Cost  Lower of Cost or Market  Other  There was a change of inventory method

## Profit or Loss From Business

### Schedule C General Information

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

TS		Principal business or profession	Business code	
Employer I.D. number				
Business name				
Business address				
Accounting method, if not cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other				
Inventory method, if not cost <input type="checkbox"/> Lower of Cost or Market <input type="checkbox"/> Other			Change of inventory method <input type="checkbox"/> Yes <input type="checkbox"/> No	
Activity type				You disposed of this property during 2011 <input type="checkbox"/>
You started or acquired this business during 2011 <input type="checkbox"/>				
Did you make any payments in 2011 that would require you to file Form(s) 1099?				<input type="checkbox"/> Yes <input type="checkbox"/> No
If "Yes," did you or will you file all required Forms 1099?				<input type="checkbox"/> Yes <input type="checkbox"/> No

**Other Information**

**2011**      **2010**

Family Health Coverage

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**Income** **2011**      **2010**

Merchant Card and third party payments from Form 1099-K

Gross receipts or sales

Statutory Employee Earnings that were not reported on Form W-2

Returns and allowances

Other income (list on detail worksheet)

**Cost of Goods Sold** **2011**      **2010**

Inventory at beginning of the year

Purchases (less cost of items withdrawn for personal use)

Cost of labor

Materials and supplies

Other costs (list on detail worksheet)

Inventory at end of year





# Sale of Home

**Name:**

**SSN:**

Enter the date you purchased the home

Enter the date you sold the home

Enter the purchase price of your old home

Seller-paid points for old home if bought after 1990

Enter the selling price of the old home

Enter any expenses from the sale of the old home

**Settlement fees or closing costs for old home.**

Abstract and recording fees

Legal fees

Surveys

Title insurance

Transfer or stamp taxes

Amounts the seller owed that you agreed to pay

Other fees or closing cost

Cost of capital improvements to old home

Special tax assessments paid on old home for local improvements, such as streets

**Other increases to basis:**

Describe:

If home was used for business, enter any depreciation claimed

**Other decreases to basis:**

Describe:

**Information on time lived in the home sold**

**You**

**Spouse**

Enter the date that you first used the property as a main home

Enter the date that you first owned the property as a main home

Have you excluded gain from the sale of another home during the 2-year period ending on the date of this sale?

Yes  No  Yes  No

If YES, answer the following:

Enter date of most recent sale of another home on which you excluded the gain

**Check the box below that applies to you if the home sold and the First Time Homebuyer Credit (Form 5405) was taken on this home.**

- I sold the home to a related person
- I converted the home to a rental or business or I still own the home but it is no longer my main home
- I transferred the home to spouse (or ex-spouse as part of my divorce settlement) Ex-spouse's Name \_\_\_\_\_
- My home was destroyed, condemned, or disposed of under threat of condemnation and I acquired or plan to acquire a new home within 2 years
- My home was destroyed, condemned, or disposed of under threat of condemnation and I do not plan to acquire a new home within 2 years
- The taxpayer who claimed the credit died in 2011.

Amount of First-Time Homebuyer Credit taken

**Please bring the contract for the sale of the home to your appointment.**

## Casualties and Thefts

Name:

SSN:

Description of properties:	Location:	Personal	Business	Investment	Employee
Cost or other basis		Date acquired			
Insurance or other reimbursement (whether or not you filed a claim)		Date of incident			
Fair market value before incident		<input type="checkbox"/> Loss from federally declared disaster area			
Fair market value after incident					

### Appendix A Information for Ponzi losses

#### Part II Computation of Deduction

Initial investment	Percentage of qualified investment	
Subsequent investments	Actual recovery	
Income reported in prior years	Potential insurance / SIPC recovery	
Withdrawals		

#### Part III Required Statements and Declarations

Name of person or entity that conducted fraudulent arrangements

Name	SSN/EIN
Street Address	
City	State      Zip

Description of properties:	Location:	Personal	Business	Investment	Employee
Cost or other basis		Date acquired			
Insurance or other reimbursement (whether or not you filed a claim)		Date of incident			
Fair market value before incident		<input type="checkbox"/> Loss from federally declared disaster area			
Fair market value after incident					

### Appendix A Information for Ponzi losses

#### Part II Computation of Deduction

Initial investment	Percentage of qualified investment	
Subsequent investments	Actual recovery	
Income reported in prior years	Potential insurance / SIPC recovery	
Withdrawals		

#### Part III Required Statements and Declarations

Name of person or entity that conducted fraudulent arrangements

Name	SSN/EIN
Street Address	
City	State      Zip

## Installment Sale Income

**Name:**

**SSN:**

TSJ		Description of property:		
Date acquired		Date sold		
				<b>2011</b>
				<b>Prior Years</b>
Selling price				
Mortgages assumed				
Cost of property sold				
Depreciation allowed				
Commissions & expense of sale				
Gross profit percentage				
Interest received				
Principal payments received				

TSJ		Description of property:		
Date acquired		Date sold		
				<b>2011</b>
				<b>Prior Years</b>
Selling price				
Mortgages assumed				
Cost of property sold				
Depreciation allowed				
Commissions & expense of sale				
Gross profit percentage				
Interest received				
Principal payments received				

TSJ		Description of property:		
Date acquired		Date sold		
				<b>2011</b>
				<b>Prior Years</b>
Selling price				
Mortgages assumed				
Cost of property sold				
Depreciation allowed				
Commissions & expense of sale				
Gross profit percentage				
Interest received				
Principal payments received				

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## Supplemental Income and Loss

### Part I - Income or Loss From Rental Real Estate and Royalties

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

TSJ		Property description	Activity Type
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Did you make any payments in 2011 that would require you to file Form(s) 1099?  Yes  No

If "Yes," did you or will you file all required Forms 1099?  Yes  No

Property Address

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Single Family Residence  Multi-Family Residence  Vacation / Short Term Rental

Commercial  Land  Royalties

Self-Rental  Other \_\_\_\_\_

Fair Rental Days \_\_\_\_\_ Personal use days \_\_\_\_\_

If multi-dwelling unit and the taxpayer occupies part, enter the percentage occupied by the taxpayer

This is your main home

Some investment is NOT at risk  Property was 100% disposed of in 2011  Property is a Single Member LLC

Income:	2011	2010
---------	------	------

Enter merchant card and third party payments from Form 1099-K

Enter "cashback" amounts, processing fees, other non-income items

Payments not reported to you from Form 1099-K

Expenses:	Direct expense		Indirect expense	
	2011	2010	2011	2010

Advertising

Auto and travel

Cleaning and maintenance

Commissions

Insurance  Includes Private Mortgage Insurance

Legal and professional fees

Management fees

Interest - mortgage

Interest - other

Repairs

Supplies

Taxes

Utilities

Other: (list)

**Other Information:** Ownership Percentage \_\_\_\_\_







## Farm Rental Income and Expenses

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

TSJ  EIN  Activity type: \_\_\_\_\_

Farm was 100% disposed of in 2011  Farm is a single member LLC

Received applicable subsidy in 2011  Some of your investment is NOT at risk

Income	2011	2010
Income from production of livestock, grains, and other crops		
Total cooperative distributions received		
Taxable amount		
Agricultural program payments received		
Taxable amount		
Commodity Credit Corporation (CCC) loans:		
CCC loans reported under election		
CCC loans forfeited or repaid with certificates		
Taxable amount		
Crop insurance proceeds and certain disaster payments:		
Amount received in 2011		
Taxable amount		
Do you elect to defer to next year? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Amount deferred from last year		
Other income		

Expenses	2011	2010	2011	2010
Car and truck expenses			Seeds and plants purchased	
Chemicals			Storage and warehousing	
Conservation expenses			Supplies purchased	
Custom hire (machine work)			Taxes	
Employee benefit programs			Utilities	
Feed purchased			Veterinary, breeding, & medicine	
Fertilizers and lime			Other expenses (list):	
Freight and trucking				
Gasoline, fuel, and oil				
Insurance (other than health)				
Interest - mortgage (paid to banks, etc.)				
Interest - other:				
Labor hired (less jobs credit)				
Pension & profit-sharing plans				
Rent - vehicles, machinery and equipment				
Rent - other (land, animals, etc.)				
Repairs and maintenance				

## Profit or Loss From Farming

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

TSJ		Principal product	Activity code
-----	--	-------------------	---------------

Accounting method, if not cash  Accrual Employer ID number \_\_\_\_\_

You did NOT materially participate in the operation of this business during 2011

Did you make any payments in 2011 that would require you to file Form(s) 1099?  Yes  No

If "Yes," did you or will you file all required Forms 1099?  Yes  No

Some investment is NOT at risk  Farm was 100% disposed of in 2011  Farm was a Single Member LLC

Income	2011	2010	2011	2010
Specified sales of livestock & other items for resale			Crop insurance received	
Sales of livestock & other items not reported in the line above			Taxable amount	
Cost of items bought for resale			Do you elect to defer to 2012? <input type="checkbox"/> Yes	
Specified sales of products you raised			Amount deferred last year	
Sale of products you raised not reported on the line above			Custom hire (machine work) income	
Total cooperative distributions			Custom hire income not reported in line above	
Taxable amount			Specified other income	
Total agricultural payments			Other income not reported in the line above	
Taxable amount			Transaction fees, certain taxes, tips, and "cash back"	
Commodity Credit Corp (CCC) loans reported			Beginning inventory for accrual	
Forfeited amount			Ending inventory for accrual	
Taxable amount			Did you use another method of valuing inventory? <input type="checkbox"/> Yes	

Expenses	2011	2010	2011	2010
Car and truck expenses			Repairs and maintenance	
Chemicals			Seeds and plants purchased	
Conservation expenses			Storage and warehousing	
Custom hire (machine work)			Supplies purchased	
Employee benefit programs			Taxes	
Feed purchased			Utilities	
Fertilizers and lime			Veterinary, breeding, & medicine	
Freight and trucking			Other expenses (list):	
Gasoline, fuel, and oil				
Insurance (other than health)				
Interest - mortgage (paid to banks, etc.)				
Interest - other				
Labor hired (less jobs credit)				
Pension & profit-sharing plans				
Rent - vehicles, machinery, and equipment				
Rent - other (land, animals, etc.)			Family health coverage payments	

# Form 1099-G Unemployment Compensation

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

TSJ  Payer's Federal I.D. Number: \_\_\_\_\_

Payer's name: \_\_\_\_\_

Payer's address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Payer's phone: \_\_\_\_\_ Account number: \_\_\_\_\_

	2011	2010		2011	2010
Unemployment compensation			State <input type="checkbox"/> State I.D. _____		
Unemployment compensation repaid in current year			State unemployment		
State/local tax refunds/credits			State withholding		
Tax year					
Federal tax withheld			<input type="checkbox"/> Unemployment benefits are from railroad		
ATAA payments					
Taxable grants					
Agriculture					
<input type="checkbox"/> Trade/business					
Market gain					

TSJ  Payer's Federal I.D. Number: \_\_\_\_\_

Payer's name: \_\_\_\_\_

Payer's address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Payer's phone: \_\_\_\_\_ Account number: \_\_\_\_\_

	2011	2010		2011	2010
Unemployment compensation			State <input type="checkbox"/> State I.D. _____		
Unemployment compensation repaid in current year			State unemployment		
State/local tax refunds/credits			State withholding		
Tax year					
Federal tax withheld			<input type="checkbox"/> Unemployment benefits are from railroad		
ATAA payments					
Taxable grants					
Agriculture					
<input type="checkbox"/> Trade/business					
Market gain					

# Form 1099-MISC

Please attach all 1099-M(s)

Name:

SSN:

TS  For  Payer's Federal ID number:

Payer's name:

Address:

City, State, Zip

2011

2010

2011

2010

Rents State  State I.D.

Royalties State tax withheld

Other income State income

Description Name of locality

Federal tax withheld Local tax withheld

Fishing boat proceeds Local income

Medical & health care payments State  State I.D.

Non-employee compensation State tax withheld

Substitute payments State income

Payer made direct sales of \$5,000 or more of consumer products Name of locality

Crop insurance proceeds Local tax withheld

Excess golden parachute Local income

Gross attorney proceeds

TS  For  Payer's Federal ID number:

Payer's name:

Address:

City, State, Zip

2011

2010

2011

2010

Rents State  State I.D.

Royalties State tax withheld

Other income State income

Description Name of locality

Federal tax withheld Local tax withheld

Fishing boat proceeds Local income

Medical & health care payments State  State I.D.

Non-employee compensation State tax withheld

Substitute payments State income

Payer made direct sales of \$5,000 or more of consumer products Name of locality

Crop insurance proceeds Local tax withheld

Excess golden parachute Local income

Gross attorney proceeds

## Pension, Annuities, Retirement, Etc. Distributions

Please attach all 1099-R(s), SSA statements, etc.

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

TS		Payer's name:	Payer's Federal ID Number:
----	--	---------------	----------------------------

Address:

City, State, Zip	<b>2011</b>	<b>2010</b>		
	<b>2011</b>	<b>2010</b>	State	State I.D.
Disability indicator	<input type="checkbox"/>	<input type="checkbox"/>	State income tax withheld	
Report as wages on 1040	<input type="checkbox"/>	<input type="checkbox"/>	State distribution	
Gross distribution			Name of locality	
Taxable amount			Local income tax withheld	
Total distribution	<input type="checkbox"/>	<input type="checkbox"/>	Local distribution	
Capital gain			State	State I.D.
Federal income tax withheld			State income tax withheld	
Employee contributions or insurance premiums			State distribution	
Distribution code(s)			Name of locality	
IRA/SEP/SIMPLE Roth: Y/N <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax withheld	
Your percentage of total distribution			Local distribution	

TS		Payer's name:	Payer's Federal ID Number:
----	--	---------------	----------------------------

Address:

City, State, Zip	<b>2011</b>	<b>2010</b>		
	<b>2011</b>	<b>2010</b>	State	State I.D.
Disability indicator	<input type="checkbox"/>	<input type="checkbox"/>	State income tax withheld	
Report as wages on 1040	<input type="checkbox"/>	<input type="checkbox"/>	State distribution	
Gross distribution			Name of locality	
Taxable amount			Local income tax withheld	
Total distribution	<input type="checkbox"/>	<input type="checkbox"/>	Local distribution	
Capital gain			State	State I.D.
Federal income tax withheld			State income tax withheld	
Employee contributions or insurance premiums			State distribution	
Distribution code(s)			Name of locality	
IRA/SEP/SIMPLE Roth: Y/N <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Local income tax withheld	
Your percentage of total distribution			Local distribution	

## Social Security Benefit Statement

			2011	2010				2011	2010			
TS		Net benefits			Medicare premiums			Income tax withheld				
TS		Net benefits			Medicare premiums			Income tax withheld				

## Foreign Earned Income

For Use by U.S. Citizens and Resident Aliens Only

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

**Part I - General Information**

Taxpayer's foreign address

Foreign city \_\_\_\_\_ ST \_\_\_\_\_

Postal code \_\_\_\_\_ Country \_\_\_\_\_

Country code \_\_\_\_\_ Occupation \_\_\_\_\_

Employer's name

Employer: US address

City \_\_\_\_\_ ST \_\_\_\_\_ Zip \_\_\_\_\_

Employer: Foreign address

City \_\_\_\_\_ ST \_\_\_\_\_

Postal code \_\_\_\_\_ Country \_\_\_\_\_

Employer is: (check any that apply)  A foreign entity  A U.S. company  Self  
 A foreign affiliate of a U.S. company  Other (specify): \_\_\_\_\_

If after 1981, you filed Form 2555 or 2555-EZ to claim an exclusion, enter the last year you filed a Form 2555.

If you claimed an exclusion in an earlier year (after 1981), have you ever revoked your choice?  Yes  No

If Yes, give the type of exclusion and the tax year for which the revocation was effective.

Of what country are you a citizen/national?

Did you maintain a separate foreign residence for your family because of adverse living conditions at your tax home?  Yes  No

If Yes, enter the city and country of the separate foreign residence. Also, show the number of days during your tax year that you maintained a second household at that address.

City and country	Number of Days			
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px; height: 20px;"></td></tr> <tr><td style="width: 20px; height: 20px;"></td></tr> <tr><td style="width: 20px; height: 20px;"></td></tr> </table>			
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List your tax home(s) during your tax year and date(s) established

Home	Date Established			
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px; height: 20px;"></td></tr> <tr><td style="width: 20px; height: 20px;"></td></tr> <tr><td style="width: 20px; height: 20px;"></td></tr> </table>			
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## Foreign Earned Income

For Use by U.S. Citizens and Resident Aliens Only

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

### Part II - Taxpayers Qualifying Under Bona Fide Residence Test

Date bona fide residence began \_\_\_\_\_, ended \_\_\_\_\_

Kind of living quarters in foreign country  Purchased house  Rented house or apartment  Rented room  
 Quarters furnished by employer

Did any of your family live with you abroad during any part of the tax year?  Yes  No

If Yes, who and for what period	Relationship	For what Period

Have you submitted a statement to the authorities of the foreign country where you claim bona fide residence that you are not a resident of that country?  Yes  No

Are you required to pay income tax to the country where you claim bona fide residence?  Yes  No

If you were present in the United States during the tax year, enter the information below.

Date arrived in U.S.	Date left U.S.	Number of days in U.S. on business	Income earned in U.S. on business	Date arrived in U.S.	Date left U.S.	Number of days in U.S. on business	Income earned in U.S. on business

State any contractual terms or other conditions relating to the length of your employment abroad:

State the type of visa under which you entered the foreign country:

Did your visa limit the length of your stay or employment in a foreign country? (If Yes, attach explanation)  Yes  No

Did you maintain a home in the United States while living abroad?  Yes  No

If Yes, enter address of your home, whether it was rented, the names of the occupants, and their relationship to you

Address \_\_\_\_\_

Occupant Name:	Relationship:

### Part III - Taxpayers Qualifying Under Physical Presence Test

The physical presence test is based on the 12-month period from: \_\_\_\_\_ through: \_\_\_\_\_

Enter your principal country of employment during your tax year: \_\_\_\_\_

Enter all travel abroad during the 12-month period shown above. Exclude travel between foreign countries that did not involve travel on or over international waters, or in or over the United States, for 24 hours or more. If the last entry is an arrival in a foreign country, enter the number of full days to the end of the 12-month period. If you have no travel to report during the period, write in the schedule "physically present in a foreign country or countries for the entire 12-month period." **Do not** include the income listed in the last column below in Part IV, but report it on Form 1040.

Name of country (including U.S.)	Date arrived	Date left	Full days present in country	Number of days in U.S. on business	Income earned in U.S. on business (attach computation)

## Foreign Earned Income

For Use by U.S. Citizens and Resident Aliens Only

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

<b>Foreign Earned Income</b>	<b>2011</b>	<b>2010</b>
Total wages, salaries, bonuses, commissions, etc.		
<b>Allowable share of income for personal services performed:</b>		
In a business (including farming) or profession		
In a partnership (list name, address, and type of income)		
<b>Noncash income:</b>		
Home (lodging)		
Meals		
Car		
Other property or facility (specify)		
<b>Allowances, reimbursements, or expenses paid on your behalf for services performed:</b>		
Cost of living and overseas differential		
Family		
Education		
Home leave		
Quarters		
Other (specify)		
Other foreign earned income (specify):		
Meals and lodging that are excludable		
<b>For Taxpayers Claiming the Housing Exclusion and/or Deduction</b>		
Qualified housing expenses for the tax year		
Location where housing expenses incurred		
Limit on housing expenses		
Enter the number of days in qualifying period that fall within your 2011 tax year		
Enter employer-provided amounts		
<b>For Taxpayers claiming the foreign earned income exclusion</b>		
Enter the number of days in qualifying period that fall within your 2011 tax year		

## Moving Expenses

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

		2011	2010
TSJ	<input type="text"/>		
	Enter the number of miles from your OLD home to your NEW workplace		
	Enter the number of miles from your OLD home to your OLD workplace		
	Enter the amount you paid for transportation and storage of household goods and personal effects		
	Enter the amount you paid for travel and lodging incurred during move (do NOT include cost of meals)		
	Enter the amount of moving expenses reimbursed to you by your employer		
	Was this a military move? <input type="checkbox"/> Yes		

## Self-Employed Health Insurance

		2011	2010
TSJ	<input type="text"/>		
	Enter total payments made during the tax year for health insurance established under business for you, your spouse or dependents		
	Enter the qualified long term care amount		
	Enter your medicare wages from an S corporation		

## Self-Employed Pensions

TSJ	<input type="text"/>		
	Enter your plan contribution rate as a decimal		
	Enter your allowable elective deferrals made during 2011		
	Enter your catch-up contributions		
	Enter the amount of designated ROTH contributions included above		

## Noncash Charitable Contributions

TSJ	<input type="text"/> Donee I.D.		
	Name of donee organization		
	Address of donee organization		
	City, State, & ZIP of donee organization		
	Description of donated property	<b>PROPERTY TYPE (if over \$5,000)</b>	
	Physical condition of donated property		Art valued more than \$20,000
	Valuation method used		Art valued less than \$20,000
	How was it acquired?		Collectibles
	Date acquired		Qualified Conservation Contribution
	Date contributed		Other Real Estate
	Donor's cost or adjusted basis		Intellectual Property
	Fair market value		Equipment
	Bargain sale price		Securities
	Average security price		Other

## Other Income and Adjustments

Name:

SSN:

### Income

	Taxpayer		Spouse	
	2011	2010	2011	2010
Taxable scholarships received				
Interest income (If over \$1,500 report only on Interest and Dividend sheet)				
Tax-exempt interest (If over \$1,500 report only on Interest and Dividend sheet)				
Dividend income (If over \$1,500 report only on Interest and Dividend sheet)				
Taxable refunds: State taxes				
Local taxes				
Alimony received				
IRA/pension distributions received. Was any portion rolled over? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Pension distributions received				
Unemployment compensation received				
Unemployment repaid in 2011				
Total Social Security received				
Lump sum benefits - earlier years				
Railroad Tier One benefits received				
Other income (please list):				

### Adjustments

Educator Expenses				
Self-employed SEP, SIMPLE and qualified plans				
Keogh contributions to defined contribution plan				
Keogh contributions to defined benefit plan				
Self-employed health insurance premium payments				
Penalty on early withdrawal of savings				
Alimony paid Name: SSN:				
Alimony paid Name: SSN:				
IRA contributions for 2011				
Student loan interest				
Jury duty pay given to employer				
Other adjustments (please list):				

## Itemized Deductions

Name:

SSN:

MEDICAL and DENTAL	2011	2010	GIFTS TO CHARITY (attach receipts)	2011	2010
Health insurance premiums			Total gifts by cash or check		
Long term care premiums			30% limitation		
Number of Medical miles before 7/1			Charitable miles		
Number of medical miles after 6/30			Other than by cash or check		
Other medical and dental expenses (list):			Carryover from prior year subject to:		
			50% limitation		
			30% limitation		
			30% limitation capital gain property		
			20% limitation		
			<b>JOB EXPENSES (list):</b>		
			Unreimbursed employee expenses		
<b>TAXES YOU PAID</b>					
State and local income taxes					
Sales tax					
Real estate taxes					
Taxes that qualify for State Property Tax Credit					
Personal property taxes					
Other taxes (list):					
			Tax preparation fees		
			<b>OTHER EXPENSE (list):</b>		
<b>INTEREST YOU PAID</b>					
Home mortgage interest & points on Form 1098					
Home mortgage interest not on Form 1098					
Name:					
Address:			<b>MISCELLANEOUS DEDUCTIONS</b>		
SSN/EIN:			Other deductions not subject to 2% limit		
Points not reported on Form 1098					
Qualified mortgage insurance premiums					
Investment interest					

# Mortgage Interest

**Name:**

**SSN:**

TSJ	For	Business name	Product		
Recipient/Lender Information:				<b>2011</b>	<b>2010</b>
Federal ID #			Mortgage interest received		
Name			Points paid		
Address			Refund overpaid interest		
City, State, Zip			Real Estate taxes paid		
Account Number			Mortgage insurance premiums		
Recipient/Lender Information:				<b>2011</b>	<b>2010</b>
Federal ID #			Mortgage interest received		
Name			Points paid		
Address			Refund overpaid interest		
City, State, Zip			Real Estate taxes paid		
Account Number			Mortgage insurance premiums		
Recipient/Lender Information:				<b>2011</b>	<b>2010</b>
Federal ID #			Mortgage interest received		
Name			Points paid		
Address			Refund overpaid interest		
City, State, Zip			Real Estate taxes paid		
Account Number			Mortgage insurance premiums		
Recipient/Lender Information:				<b>2011</b>	<b>2010</b>
Federal ID #			Mortgage interest received		
Name			Points paid		
Address			Refund overpaid interest		
City, State, Zip			Real Estate taxes paid		
Account Number			Mortgage insurance premiums		

## Expenses for Business Use of Your Home

Name:

SSN:

TSJ      For

**Business Use of Home**

2011

2010

Sqrea feet of home used exclusively for business

Total square feet of home

**Use of Home for Daycare**

2011

2010

Area used part time for business

Total hours used for daycare

Total hours available

Did you live in the home all year?

Yes    No

**Expenses**

Expenses directly related to business use **only**

Total Household expenses

Did you claim office in home expenses last year?    Yes    No

2011

2010

2011

2010

Deductible mortgage interest

Real estate taxes

Excess mortgage interest

Insurance

Rent

Repairs and maintenance

Utilities

Other expenses

**Cost of Home**

2011

2010

Enter the **smaller** of your home's adjusted basis or its fair market value

Does this include the value of the land?    Yes    No

Value of land

Date placed in service

Date taken out of service

## Employee Business Expense

Name:

SSN:

TS		Occupation
----	--	------------

### Part I - Employee Business Expense and Reimbursements

	2011	2010
Rural mail carrier		
Parking fees, tolls, and local transportation, including train, bus, etc.		
Travel expense while away from home overnight, including lodging, airplane, car rental, etc. <b>Do Not</b> include meals and entertainment		
Other business expenses		
Meals and entertainment expenses		
DOT meals		
Enter reimbursements received from your employer that were <b>not</b> reported to you in box 1 of Form W-2. Include any amount reported under code "L" in box 12 on your Form W-2 for		
Other business expenses		
Meals and entertainment expenses		
Portion of total expenses that is for impairment-related work expenses of disabled employee		
Portion of total expenses that is for Armed Forces reservist		
<input type="checkbox"/> Qualifying performing artist <input type="checkbox"/> Fee-based state or local government official <input type="checkbox"/> Pastor		

### Business Vehicle Expenses

Vehicle Description	Vehicle 1		Vehicle 2	
	2011	2010	2011	2010
Enter the date vehicle was placed in service				
Total miles vehicle was driven during 2011				
Business miles before 7/1 included above				
Business miles after 6/30 included above				
Average daily roundtrip commuting distance				
Commuting miles included in total miles above				
Taxes				
Gasoline, oil, repairs, vehicle insurance, etc.				
Vehicle rentals				
Inclusion amount				
Value of employer-provided vehicle (applies only if 100% annual lease value was included on Form W-2)				
Enter cost or other basis				
Enter section 179 deduction				
Enter depreciation method and percentage				
If an employer provided vehicle, was personal use during off duty hours permitted?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Do you or your spouse have another vehicle available for personal use?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Do you have evidence to support your deduction?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
If "Yes", is the evidence written?	<input type="checkbox"/> Yes <input type="checkbox"/> No			



## Credit for Federal Tax on Fuels

Name:		SSN:		Gallons USED	2010
1a Off-highway business use					
1b Use on a farm for farming purposes					
1c Other non-taxable use of gasoline		Type			
1d Exported					
2a Aviation gasoline used in commercial aviation					
2b Aviation gasoline other nontaxable use		Type			
2c Exported					
2d LUST tax on aviation fuels used in foreign trade					
3a Nontaxable use		Type		Visible evidence of dye	
3b Use on a farm for farming purposes					
3c Use in trains					
3d Used in intercity/local bus					
3e Exported					
4a Nontaxable use		Type		Visible evidence of dye	
4b Use on a farm for farming purposes					
4c Intercity and local buses					
4d Exported					
4e Nontaxable use taxed at \$.044		Type			
4f Nontaxable use taxed at \$.219		Type			
5a Kerosene taxed at \$.244					
5b Kerosene taxed at \$.219					
5c Nontaxable use taxed at \$.244		Type			
5d Nontaxable use taxed at \$.219		Type			
5e LUST tax on aviation fuel used in foreign trade					
6 Ultimate vendor ID #					
6a Use by a state or local government				Visible evidence of dye	
6b Use in certain intercity and local buses					
7 Ultimate vendor ID #					
7a Kerosene for state and local government				Visible evidence of dye	
7b Sales from blocked pump					
7c Certain intercity and local buses					
8 Ultimate vendor ID #					
8a Use in commercial aviation taxed at \$.219					
8b Commercial aviation taxed at \$.244					
8c Nonexempt noncommercial aviation					
8d Other nontaxable uses taxed at \$.244		Type			
8e Other nontaxable uses taxed at \$.219		Type			
8f LUST tax on aviation fuels used in foreign trade					

## Credit for Federal Tax on Fuels

Name:		SSN:		Gallons USED	2010
<b>9</b>	Registration number				
<b>9a</b>	Ethanol alcohol mixtures				
<b>9b</b>	Alcohol mixtures other than ethanol				
<b>10</b>	Registration number				
<b>10a</b>	Biodiesel mix				
<b>10b</b>	Agri-biodiesel mix				
<b>10c</b>	Renewable diesel mixtures				
<b>11a</b>	Liquefied petroleum gas	Type			
<b>11b</b>	"P series" fuels	Type			
<b>11c</b>	Compressed Natural Gas (GGE = 126.67 cu. ft.)	Type			
<b>11d</b>	Liquefied hydrogen	Type			
<b>11e</b>	Any liquid fuel from the Fischer-Tropsch process	Type			
<b>11f</b>	Liquid fuel derived from biomass	Type			
<b>11g</b>	Liquefied natural gas	Type			
<b>11h</b>	Liquefied gas derived from biomass	Type			
<b>12</b>	Ultimate Vendor ID #				
<b>12a</b>	Liquefied petroleum gas				
<b>12b</b>	"P series" fuels				
<b>12c</b>	Compressed natural gas				
<b>12d</b>	Liquefied hydrogen				
<b>12e</b>	Liquid fuel derived from coal				
<b>12f</b>	Liquid fuel from biomass				
<b>12g</b>	Liquefied natural gas				
<b>12h</b>	Liquefied gas derived from biomass				
<b>12i</b>	Compressed gas derived from biomass (GGE = 122 cu. ft.)				
<b>13</b>	Registration number				
<b>13a</b>	State or local government diesel				
<b>13b</b>	State or local government kerosene				
<b>13c</b>	State or local government aviation				
<b>14a</b>	Nontaxable use	Type			
<b>14b</b>	Exported				
<b>15</b>	Registration number				
<b>15a</b>	Blender credit				
<b>16a</b>	Exported dyed diesel				
<b>16b</b>	Exported dyed kerosene				

# First-Time Homebuyer Credit

**Name:** \_\_\_\_\_ **SSN:** \_\_\_\_\_

**Form 5405 - First-Time Homebuyer Credit**

TSJ

Address of home qualifying for the credit  
Street

City

State ZIP

Date the home was purchased

Yes No

If date purchased is after April 30, 2011, and before July 1, 2011, was a binding contract signed before May 1, 2011, to purchase the home before July 1, 2011?

Yes  No

Are you (or your spouse if married) a member of the military or foreign service?

Was the home purchased from a related person?

Yes  No

Are you choosing to claim the credit on your 2010 return?

**Credit**

Purchase price of the home

If someone other than a spouse held an interest in the home, enter only the taxpayer's share of the credit

Purchase of the home qualifies for the credit as:

First-time homebuyer  Long-time resident

## Residential Energy Credits

**Name:**

**SSN:**

TSJ

Were improvements or costs made to your main home located in the US?  Yes  No

Address of main home

City, State, ZIP

Were improvements or costs related to the construction of this main home?  Yes  No

Enter the nonbusiness energy property credit that you took in:

2006	2007	2009	2010
Qualified energy efficient improvements			
Insulation material or systems primarily designed to reduce heat loss or gain			
Exterior doors that meet or exceed Energy Star requirements			
Metal or asphalt roof with appropriate pigmented coatings designed to reduce heat gain			
Exterior windows and skylights that meet or exceed Energy Star requirements			
Enter the amount of window expense you claimed in:			
2006	2007	2009	2010

Qualified energy efficient improvements

Insulation material or systems primarily designed to reduce heat loss or gain

Exterior doors that meet or exceed Energy Star requirements

Metal or asphalt roof with appropriate pigmented coatings designed to reduce heat gain

Exterior windows and skylights that meet or exceed Energy Star requirements

Enter the amount of window expense you claimed in:

2006	2007	2009	2010
Residential energy property costs			
Energy efficient building property costs			
Qualified natural gas, propane, or oil furnace or hot water boiler			
Advanced main air circulating fan used in a natural gas, propane, or oil furnace			
Residential Energy Efficient Property Credit			
Qualified solar electric property costs			
Qualified solar water heating property costs			
Qualified small wind energy property costs			
Qualified geothermal heat pump property costs			
Was qualified fuel cell property installed on or in your main home in US? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Address of main home			
City, State, ZIP			
Qualified fuel cell property costs			
Kilowatt capacity of property on line 22			
Amount of unused credit from 2010 Form 5695, line 28			

Residential energy property costs

Energy efficient building property costs

Qualified natural gas, propane, or oil furnace or hot water boiler

Advanced main air circulating fan used in a natural gas, propane, or oil furnace

Residential Energy Efficient Property Credit

Qualified solar electric property costs

Qualified solar water heating property costs

Qualified small wind energy property costs

Qualified geothermal heat pump property costs

Was qualified fuel cell property installed on or in your main home in US?  Yes  No

Address of main home

City, State, ZIP

Qualified fuel cell property costs

Kilowatt capacity of property on line 22

Amount of unused credit from 2010 Form 5695, line 28

## Energy Credits

Name:

SSN:

### 8834 - Qualified Electric Vehicle Credit

	TSJ	Vehicle 1	Vehicle 2
Year of vehicle			
Make of vehicle			
Model of vehicle			
Vehicle Identification Number			
Date vehicle was placed in service			
Cost of vehicle			
Business/investment use percentage			
Section 179 expense deduction			
Credits from passive activities			

### 8936 - Qualified Plug-in Electric Drive Motor Vehicle Credit

	TSJ	Vehicle 1	Vehicle 2
Year of vehicle			
Make of vehicle			
Model of vehicle			
Vehicle Identification Number			
Date vehicle was placed in service			
Tentative Credit			
Business/Investment use percentage			

### Form 8908 - Energy Efficient Home Credit

	TSJ	
<b>1a</b>	Total number of qualified energy efficient homes meeting the 50% standard that were sold during the year	
<b>2a</b>	Total number of qualified energy efficient manufactured homes meeting the 30% standard that were sold during the tax year	

### Form 8910 - Alternative Motor Vehicle Credit

	TSJ	Vehicle 1	Vehicle 2
Year of vehicle			
Make of vehicle			
Model of vehicle			
Vehicle Identification Number			
Date vehicle was placed in service			
Maximum credit allowable			
Cost of converting vehicle to plug-in electric drive motor			
Section 179 expense deduction			
Business/investment use percentage			





## Auto Expense Worksheet

**Name:**

**SSN:**

For

Business name & Profession/Product

Description

Date placed in service

Do you or your spouse have another vehicle available for personal use?  Yes  No

Was your vehicle available for use during off-duty hours?  Yes  No

Do you have evidence to support your deduction?  Yes  No

If "Yes," is the evidence written?  Yes  No

Enter the number of miles your vehicle was used for:

**a** Business miles before 7/1

**b** Business miles after 6/30

**c** Commuting

**d** Other

**2011**

**2010**

**Expenses:**

**2011**

**2010**

Garage rent

Gas

Insurance

Licenses

Oil

Parking fees

Lease payments

Interest

Property tax

Repairs

Tires

Tolls

Other expenses (list):

Apply Business %