

**2011 GENERAL INFORMATION SHEET**

E-Mail Address - \_\_\_\_\_

Phone Numbers: Home - \_\_\_\_\_

H: Work/Cell - \_\_\_\_\_

W: Work/Cell - \_\_\_\_\_

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

**PERSONAL DATA**

Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during the year? If you attempted to adopt a child, enter the amount of adoption related expenses you paid \$\_\_\_\_\_.

If you are not married, did any of your children age 19 or older live with you during the year?

Do you have a child under age **19** or a full-time student under age **24** as of December 31, 2011, with investment income in excess of **\$950**, or with investment income in excess of \$300 **and** earned income in excess of \$650?

Can you be claimed as a dependent on another person's tax return?

Were you audited by the IRS or the State during the year? If so, please provide a copy of the related report.

Did you have an interest in or authority over a financial account in a foreign country?

Did you have any debts cancelled or forgiven? If so, please provide the related Form 1099-C.

**PURCHASES AND SALES OF ASSETS**

Did you purchase, sell, or refinance your home, or take out a home equity loan during the year? If so, please Provide closing papers and other relevant information.

Did you purchase or sell any business assets (equipment, vehicles, real estate, etc.)? If so, please provide the date placed in service and the cost or the date sold and selling price on your tax organizer. Please provide closing papers for real estate purchases or sales.

Did you sell any stocks, bonds, mutual funds, or other investment property during the year? If so, please provide date acquired, date sold, sales price, cost or basis, and expenses of sale on your tax organizer. **In the case of mutual funds, please provide a statement indicating cost basis if available.**

Did you buy a "qualified clean fuel vehicle" or "qualified electric vehicle"? If so, please provide the details.

Did you purchase a boat or motor vehicle, or did you personally pay for the construction materials for a home you built or remodeled during 2011? If so, please indicate the related sales tax paid \_\_\_\_\_.

**OTHER DEDUCTIONS AND CREDITS**

If you installed energy efficient property on your home, such as exterior doors, windows, insulation, furnace, central air or water heater, you may be eligible for a tax credit of up to \$500. If so, please provide the details.

If you are a renter, please indicate the amount of rent paid \$\_\_\_\_\_. Was heat included? \_\_\_\_\_.

If your total household income is less than **\$24,680** for 2011, you may qualify for the Homestead credit. If so, and you are a homeowner, please enclose a copy of your **2011** real estate tax bill. If you are a renter, please enclose a completed rent certificate signed by your landlord.

If neither you nor your spouse were covered by an employer sponsored health insurance plan, how much health insurance did you pay in 2011? \$\_\_\_\_\_.

If you contributed to a health savings account for 2011 **other than through payroll withholding**, please indicate the amount you contributed \_\_\_\_\_ and the annual deductible for your health insurance plan\_\_\_\_\_.

Did you make any non-cash contributions (clothing, household goods, etc.)? If so, amount \$\_\_\_\_\_.

Did you or your spouse work out of town for any part of the year?

Did you have any unreimbursed job-related mileage (other than to/from work)? If yes, \_\_\_\_\_ bus. miles.

Did you incur any child care expenses to enable you to work? If so, amount \$\_\_\_\_\_.

Did you or your spouse have any gambling or lottery winnings? If so, amount \$\_\_\_\_\_.

Are you or your spouse disabled as a result of military combat, or are you the spouse of a person who died as a result of military combat? If so, you may be eligible for a credit based on the property taxes for your home.

**AUDIT NOTICE PROTECTION**

Are you interested in our "Audit Notice Protection" program for 2011? (\$30 additional fee) The details of our Audit Notice Protection program are described in our letter included with this mailer.

**ELECTRONIC FILING**

In order to comply with federal and State E-filing mandates, we will be electronically filing all tax returns that are eligible for electronic filing. If you have a refund, it can be directly deposited or a refund check can be mailed to you. If you have a balance due on your tax return, the tax payment can be electronically withdrawn from your bank account on April 17, 2012 or you can send in a check and payment voucher to the IRS and/or State. If there is a change in the bank account to be used for direct deposit of your refund, please attach a copy of a voided check **or** provide your bank name, routing transit number and account number where indicated on your tax organizer.

**IRA'S AND RETIREMENT PLANS**

Yes No **DISTRIBUTIONS**

Did you or your spouse receive distribution from a profit-sharing plan, retirement plan, or IRA? If so, enter date \_\_\_\_\_ and amount \$ \_\_\_\_\_. If **rolled over** to a traditional IRA, enter date \_\_\_\_\_ and amount \$ \_\_\_\_\_. If **converted** to a Roth IRA, enter date \_\_\_\_\_ and amount \$ \_\_\_\_\_.

**ANNUAL IRA CONTRIBUTIONS**

For 2011, wage-earners and their spouses can each contribute a maximum of **\$5,000 (\$6,000** if age 50 or older as of December 31, 2011) to IRA accounts. Such contributions can be made **either** to a traditional IRA (possibly deductible, depending on income), or to a non-deductible Roth-IRA. The advantage of a Roth-IRA is that qualified withdrawals are non-taxable. Please note that low income taxpayers (less than \$55,500 in AGI if married, \$27,750 if single) are eligible for a credit, ranging from 10% to 50%, of the first \$2,000 of contributions (per taxpayer) to an IRA account or elective deferrals to an employer retirement plan.

Did you (or will you) or your spouse make any contributions to a traditional or Roth-IRA for 2011? If so, enter the date \_\_\_\_\_ and amount \$ \_\_\_\_\_ (taxpayer); enter date \_\_\_\_\_ and amount \$ \_\_\_\_\_ (spouse). Please circle whether this is a traditional or Roth-IRA (taxpayer) and/or traditional or Roth-IRA (spouse).

**EDUCATIONAL INCENTIVES**

**STUDENT LOAN INTEREST**

For 2011, a deduction of up to **\$2,500** per tax return may be allowed (depending on income) for student loan interest paid. If you paid student loan interest during 2011 for yourself, your spouse, or someone who was your dependent at the time the loan was taken out, please indicate the amount \$ \_\_\_\_\_.

**AMERICAN OPPORTUNITY CREDIT, LIFETIME LEARNING CREDIT, TUITION AND FEES DEDUCTION**

Did you incur any education-related expenses for yourself, your spouse, or a dependent child to attend an eligible higher education institution? If yes, please list the following for each college student during 2011

Name of Student	At Least ½ Normal Student Load (yes or no)	Degree Program?*	Tuition Paid	Date(s) Paid	Academic Period (e.g. Fall '10)	Standing (Fr., Soph., etc.)
1. _____	_____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____	_____	_____

\*2-year degree, 4-year degree, masters program, doctorate