### **Client Organizer Topical Index**

This client organizer topical index is designed to help you quickly locate the items listed. To use the index just locate the topic and refer to the page number listed. The page number corresponds to the number printed in the top right corner of your organizer sheets. Please note this organizer is customized specifically for you, and may not contain all of the pages listed here.

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Farm rental income and expenses 30, 31 State & local estimate payments 6			•	
	•			
Federal estimate payments 5 State & local withholding 9, 15,	·	· ·		
			<u> </u>	9, 15, 19
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First-time homebuyer 71 Student loan interest paid 47	•		·	
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Foreign dividend income 11 Trust income 33	-			
Foreign earned income 38, 39 Unemployment compensation 17	Foreign earned income	38, 39	Unemployment compensation	17
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Foreign interest income 10 U.S. savings bonds educational exclusion 46	Foreign interest income	10	U.S. savings bonds educational exclusion	46
Foreign taxes paid 76, 77 Wages and salaries 7, 9	Foreign taxes paid	76, 77	Wages and salaries	7, 9

Please note the following conventions used throughout your client organizer: T/S/J and T/S headings should be used to indicate if an item belongs to the (T)axpayer, (S)pouse, or (J)oint. Also, if an item did not occur in your resident state, please indicate the state's postal code abbreviation in which the item occurred. Control totals and [] numbers are for preparer use only.

Form ID: INDX

Form ID: 1040		Persona	ii intormat	ion				1
Filing (Mandall)	determination and a second second							
• ,	status code (1 = Single, 2 = Married filing	joint, 3 = Married filing sepa	rate, 4 = Head of hou	sehold, 5 = Quali	fying widow(er))			[1]
•	e married but living apart all year nresident alien spouse does not h	ave an Individual Tay	naver Identificat	on Number (	ITINI)			[2] [3]
Mark II your Hor	iresident alien spouse does not n	ave all illulvidual Tax		on Muniber (	111111)	•		
Social security i	number		Taxpayer	[4]		S	pouse	[5]
First name				[ <del>4</del> ] [6]	-			[3] [7]
Last name				[8]				[7] [9]
Occupation				[0] [10]				[11]
•	to the presidential election camp	naign fund? (1 – Vas 2 –	No 3 – Blank)	[10] [12]				t'''. [14]
•	ent of another taxpayer	aigir rana. (1 = 100, 2 =	140, 0 = Blank)	[15]				[16]
•	ncome less than 1/2 support age	18 or 19 - 23 full-time	student? (Y N)	[17]				
Mark if legally b	· · · · · ·		(1,11)	[20]				[21]
Date of birth				[22]				[23]
Date of death		_		[24]				[25]
Work/daytime te	elephone number/ext number	_	[26]	[27]			28]	[29
•	elephone number			[30]			· -	[31]
ū	e us to discuss your return with the	ne IRS? (Y, N)		[32]				
		,						
		Present M	Mailing Add	dress				
Address								[36]
Apartment numl	ber							[37]
•	al code, zip code				[38]	[39]	_	[40]
Foreign country								[42]
In care of addre								 [45]
				41				
		Depende	ent Informa	ation				
	(	*Please refer to Dep	endent Codes I	ocated at th	e bottom)	Months***	Don	Care
	[46]						odes	expenses paid for
First Name	Last Name	Date of Birth	Social Secur	ity No.	Relationship	home	k **	dependen
		-						
		-						
		-						
			-					
	ho lived with you but is not your o	lependent			-			[47
Social security i	number of qualifying person							[48
		Depen	dent Codes					
*Basic	1 = Child who lived with you		**Other	1 = Studen	t (Age 19 - 23)			
	2 = Child who did not live with	you		2 = Disable	ed dependent			
	3 = Other dependent			3 = Depend	dent who is both a	student and	disable	ed
	4 = Claimed under pre-1985 ag	reement						
	5 = Qualifying child for Earned	I Income Credit only	,					
	6 = Children who lived with yo	-		ome Credit				
	7 = Children who lived with yo							
	8 = Children who lived with yo				rned Income Credi	t		
***Months	77 = Reported on odd year reti							
	88 = Reported on even year re							
	99 = Not reported on return							
	·							

Form ID: 1040

Form ID: Info

## **Client Contact Information**

#### 2

#### Preparer - Enter on Screen Contact

Tax matters person (Indicate which spouse handles tax return related questions) (	( Blank = Both, T = Taxpayer, S = Spouse)	[8]
Taxpayer email address		[9]
Spouse email address		[10]
	Taxpayer	Spouse
Car telephone number	[11]	[19]
Fax telephone number	[12]	[20]
Mobile telephone number	[13]	[21]
Pager number	[14]	
Other:	[15]	[23]
Telephone number	[16]	[24]
Extension	[17]	[25]
Preferred method of contact		
Email, Work phone, Home phone, Fax, Mobile phone, Car phone	[18]	[26]

#### **NOTES/QUESTIONS:**

		Estimated Taxe	es 		5
f you have an overpayment of 20	011 taxes, do you want	the excess:			
Refunded	•				[43]
Applied to 2012 estimated	tax liability				[44]
Do you expect a considerable cha	ange in your 2012 incon	ne? (Y, N)			[45
f yes, please explain any differen	ices:				
					[46
					[47
					[48
					[49
Do you expect a considerable cha	ange in your deductions	s for 2012? (Y, N)			[50
yes, please explain any differen	ices:				
					[51
					[52
					[53
					[54
Do you expect a considerable cha	-	our 2012 withholding? (Y, N)			[55]
f yes, please explain any differen	ices:				
					[56
					[57
					[58
On you expect a change in the p	umber of dependents of	aimed for 20122 av N			[59
Do you expect a change in the not go you expect a change in the not go you different for you want to make the more than the not go you want to make the not go you want to		aimed for 2012? (Y, N)			[60]
					[61
					[62
					[63
					[64
	2011 Fe	ederal Estimated Ta	ax Pavments	 S	
			<b>,</b>		
2010 overpayment applied to 201				+	
Mark if you paid the calculated ar	mounts on the dates du	e indicated below. Skip the re	emaining fields.		
		h	d d	ata di ana arrette alarre	
f your estimated payments were		iue or were for an amount oth	ier than the calcula	ated amount below,	please enter
he actual date and amount paid.					
	Date Due	Date Paid if After Date Du	ie Amoun	t Paid	Calculated Amount
st quarter payment	4/18/11				Jaioaiatoa Amodiit
and quarter payment	6/15/11	[5] [7]	+		
Brd quarter payment	9/15/11		+		
	1/17/12	[11]	+		
	1/11/12	[''']			
th quarter payment		[13]	+	[14]	
		[13]	+	[14]	

Control Totals +	I Form ID: Est I
Control Totals +	i onii ib. Est

TOILID. SEFIIR	2011	State Estim	ated Tax Payme	nts		6
Tarana arang (On arang Alaista arang ar						
Taxpayer/Spouse/Joint (T, S, J)						<u>_[1]</u>
State postal code						[2]
Assessed a circle with 2040 reduces						
Amount paid with 2010 return					+	
2010 overpayment applied to '11 estimates					+	[4]
Treat calculated amounts as paid						_[8]
Date Paid			Amount	Paid	Calculated Amo	ount
1st quarter payment[9]			+			
2nd quarter payment[11]			+			
3rd quarter payment[13]			+			— I
4th quarter payment[15]			+	[16]		
Additional payment[17]			+	[18]		
	2011	City Estimat	ed Tax Payment	S		
City #1				City #2		
City name		[28]	City name	City #2		[50]
Amount paid with 2010 return	+	[31]	Amount paid with 2010	return	+	[53]
2010 overpayment applied to '11 estimates	+	[32]	2010 overpayment appl	lied to '11 estimates	+	[54]
Treat calculated amounts as paid		_[36]	Treat calculated amoun	ts as paid		_[58]
Date Paid	Am	ount Paid		Date Paid	Amount Paid	
1st quarter payment[37]	+	[38]	1st quarter payment	[59]	+	[60]
2nd quarter payment[39]	+	[40]	2nd quarter payment	[61]	+	[62]
3rd quarter payment[41]		[42]	3rd quarter payment	[63]	+	[64]
4th quarter payment[43]	+	[44]	4th quarter payment	[65]	+	[66]
Calculated Amour	nt			Calculated Amour	nt	_
1st quarter payment			1st quarter pay	ment		
2nd quarter payment			2nd quarter pay			
3rd quarter payment			3rd quarter pay	ment		
4th quarter payment			4th quarter pay	ment		
City #3			City manner	City #4		
City name		[72]	City name			[94]
Amount paid with 2010 return		[75]	Amount paid with 2010		+	[97]
2010 overpayment applied to '11 estimates Treat calculated amounts as paid	+	[76] [80]	2010 overpayment appl Treat calculated amoun		+	[98] [102
Data Baid	A	—		Date Baid	Amount Dald	_
Date Paid  1st quarter payment [81]		ount Paid	1st quarter payment	Date Paid	Amount Paid	[104
		[82] [84]	2nd quarter payment	[103]	+	[104
2nd quarter payment [83] 3rd quarter payment [85]			3rd quarter payment	[105] [107]	+	
4th quarter payment [87]		· ·	4th quarter payment	[107]	+	
	'	[88]	4th quarter payment	[109]	+	
Calculated Amour	nt		4 of aventer and	Calculated Amour	nt	7
1st quarter payment		<del></del>	1st quarter pay			
2nd quarter payment		<del></del>	2nd quarter pay			
3rd quarter payment		<del></del>	3rd quarter pay			
4th quarter payment			4th quarter pay	ment		

Form ID: SumRep	Income Summary	
	income duminary	

7

Form ID: SumRep

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	2 = N/A
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## Wages and Salaries #1

Please provide all copies of Form W-2.						
Please provide	2011 Information	Prior Year Information				
Taxpayer/Spouse (T, S)	[1]					
Employer name	[3]					
Were these wages earned for service as: (1 = Minister, 2 = Military, 3 = Fall	rming / Fishing, 4 = National Guard) [5]					
Mark if this is your current employer						
Federal wages and salaries (Box 1)	+[10]					
Federal tax withheld (Box 2)	+[12]					
Social security wages (Box 3) (If different than federal wages)	+[14]					
Social security tax withheld (Box 4)	+[16]					
Medicare wages (Box 5) (If different than federal wages)	+[18]					
Medicare tax withheld (Box 6)	+[20]					
SS tips (Box 7)	+[22]					
Allocated tips (Box 8)	+[24]					
Dependent care benefits (Box 10)	+[26]					
Box 13 -						
Statutory employee	[28]					
Retirement plan	[29]					
Third-party sick pay	[30]					
State postal code (Box 15)	[31]					
State wages (Box 16) (If different than federal wages)	+[33]					
State tax withheld (Box 17)	+[35]					
Local wages (Box 18)	+[37]					
Local tax withheld (Box 19)	[39]					
Name of locality (Box 20)	[42]					
	Control Totals +					
Wages	s and Salaries #2					
	de all copies of Form W-2.					
r lease provide	2011 Information	Prior Year Information				
Taxpayer/Spouse (T, S)	[1]					
Employer name						

1 10000 p. 0 100 d. 11 00 p. 10 100 d. 11	2011 Information	Prior Year Information
Taxpayer/Spouse (T, S)	[1]	
Employer name	[3]	
Were these wages earned for service as: (1 = Minister, 2 = Military, 3 = Farming / Fishing, 4 =	National Guard)[5]	
Mark if this your current employer	[6]	
Federal wages and salaries (Box 1)	+[10	D]
Federal tax withheld (Box 2)	+[12	2]
Social security wages (Box 3) (If different than federal wages)	+[14	1]
Social security tax withheld (Box 4)	+[16	<u> </u>
Medicare wages (Box 5) (If different than federal wages)	+118	3]
Medicare tax withheld (Box 6)	+[20	oj
SS tips (Box 7)	+[22	2]
Allocated tips (Box 8)	+[24	1]
Dependent care benefits (Box 10)	+[26	[
Box 13 -		
Statutory employee	[28	3]
Retirement plan		9]
Third-party sick pay	[30	oj .
State postal code (Box 15)	[31	1]
State wages (Box 16) (If different than federal wages)	+[33	3]
State tax withheld (Box 17)	+[35	5]
Local wages (Box 18)	+[37	7]
Local tax withheld (Box 19)	[39	9]
Name of locality (Box 20)	[42	2]

	Form ID: W2

Please provide copies of all Form 1099-INT or other statements reporting interest income.

\*Whole numbers will be treated as \$ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.

10

T/S/J	Type Code (*	*See c	odes below)	Interest [1] Income	Tax Exempt Income	Penalty on Early Withdrawal	U.S. Obligations* \$ or %	Tax Exempt* \$ or %	Foreign Taxes Paid	Prior Year Information
		1	Payer							
			Amounts	<b>+</b>						
		2	Payer				1		<del> </del>	
	1		Amounts	<del>-</del>						
		3	Payer							
	ı		Amounts	<b>+</b>						
		4	Payer				T		<u> </u>	
	ı		Amounts	•						
		5	Payer				1		<u> </u>	
	1		Amounts	<b>+</b>						
		6	Payer							
	1		Amounts	<b>F</b>						
		7	Payer							
	1		Amounts	<b>-</b>						
		8	Payer				<u> </u>		<u> </u>	
	1		Amounts	•						
		9	Payer			T	<del>                                     </del>		<del>                                     </del>	
	<u> </u>		Amounts	<b>-</b>						
		10	Payer			T	<del>                                     </del>		<del>                                     </del>	
			Amounts	+						

	**Interest Codes	
Blank = Regular Interest	4 = Accrued Interest	6 = ABP Adjustment
3 = Nominee Distribution	5 = OID Adjustment	7 = Series EE & I Bond

	Control Totals +		Form ID: B-1
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Please provide copies of all Form 1099-DIV or other statements reporting dividend income.

\*Whole numbers will be treated as \$ amounts. Enter percentages in the XXX.XX format. For example, enter 100% as 100.00 or 75.5% as 75.50.

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T S Typ J Cod	e  e (**s	ee codes below)	Ordinary [1] Dividends	Qualified Dividends	Total Cap Gain Distributions	Section 1250	Sec. 1202	28% Capital Gain	Tax Exempt Dividends	U.S. Obligations* \$ or %	Tax Exempt* \$ or %	Foreign Taxes Paid	Prior Year Information
	1	Payer +											
	2	Payer +											
	3	Payer +											
	4	Payer +											
	5	Payer +											
	6	Payer +											
	7	Payer +											
	8	Payer +											
	9	Payer +											
	10	Payer +											

	**Dividend Codes
Blank = Other	3 = Nominee

	Control Totals +		Form ID: B-2
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Form ID: D	Sales of Stocks, Securities, and Other Investment Property	14
	Please provide copies of all Forms 1099-B and 1099-S	
Did you have ar	ny securities become worthless during 2011? (Y, N)	[10]
Did you have ar	ny debts become uncollectible during 2011? (Y, N)	_[11]

[12]

Form ID: D

Did you have any commodity sales, short sales, or straddles? (Y, N)

/J	Description of Property	Date Acquired	Date Sold	Gross Sales Price (Less expenses of sale)	Cost or Other Basi
/3	Description of Property	Date Acquired	Date Solu	_ +[1]	
			-	+	+
		<del></del>		+	
		<del></del>			
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			<u></u>	_ +	+

Form	ID:	10991	R

# Pension, Annuity, and IRA Distributions #1

Please provid	le all Forms 1099-R. 2011 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_[1]	
Name of payer		
State postal code	[5]	
Gross distributions received (Box 1)	+	
Taxable amount received (Box 2a)	+	
Federal withholding (Box 4)	+ [11]	
Distribution code (Box 7)		
Mark if distribution is from an IRA, SEP, SIMPLE retirement pla	<del></del>	
State withholding (Box 12)	+[15]	
Local withholding (Box 15)	+[17]	
Amount of rollover	+ [19]	
Mark if distribution was due to a pre-retirement age disability		
Mark if distribution was from an inherited IRA		
man il distributori vas nom an illionos nov		
	Control Totals +	
Pension, Annuit	y, and IRA Distributions #2	
Please provid	le all Forms 1099-R. 2011 Information	Prior Year Information
Taxpayer/Spouse (T, s)		THO TEAL IIIIOIIIIAUUII
Name of payer	_[1]	
State postal code	[3]	
Gross distributions received (Box 1)	[5]	
Taxable amount received (Box 2a)	+[7] + [9]	
` ,		
Federal withholding (Box 4)	+[11]	
Distribution code (Box 7)  Mark if distribution is from an IRA SER SIMPLE retirement plants.	[13]	
Mark if distribution is from an IRA, SEP, SIMPLE retirement pla	_	
State withholding (Box 12)	+[15]	
Local withholding (Box 15)	+[17]	
Amount of rollover	+[19]	
Mark if distribution was due to a pre-retirement age disability	[21]	
Mark if distribution was from an inherited IRA	_[22]	
	Control Totals +	
Pension. Annuit	y, and IRA Distributions #3	
	le all Forms 1099-R.	
p	2011 Information	Prior Year Information
Taxpayer/Spouse (T, S)	_[1]	
Name of payer	[3]	
State postal code	[5]	
Gross distributions received (Box 1)	+[7]	
Taxable amount received (Box 2a)	+[9]	
Federal withholding (Box 4)	+[11]	
Distribution code (Box 7)	[13]	
Mark if distribution is from an IRA, SEP, SIMPLE retirement pla	<del></del>	
State withholding (Box 12)	+[15]	
Local withholding (Box 15)	+[17]	
Amount of rollover	+[19]	
Mark if distribution was due to a pre-retirement age disability		
Mark if distribution was from an inherited IRA		
	Control Totals +	
		<u>,                                      </u>
		Form ID: 1099R

		2011 Info	ormation	Prior Year Information
State and local income	tax refunds		+[1]	
		Taxpayer	Spouse	
Alimony received		+[3]	+[4]	
Unemployment compen	sation	+[8]		
Unemployment compen	sation federal withholding	+[8]	+[9]	
Unemployment compen	sation state withholding	+[8]		
Unemployment compen	sation repaid	+[11]		
Alaska Permanent Fund	d dividends	+[19]		
Self-				
Employment Income ?				
T/S/J (Y, N)			2011 Information	Prior Year Information
	Other income, such as: Co	mmissions, Jury pay, Director fees	, Taxable scholarships	
			+[14]	
			+	
			+	
			+	
			+	
			+	
			+	
			+	
			+	
			+	
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			+	
			+	
			+	
			+	
			+	
			+	
			+	

#### **NOTES/QUESTIONS:**

Control Totals +	Form ID: Income

## Schedule C - General Information

Preparer use only				
		2011 Information		Prior Year Information
Taxpayer/Spouse/Joint (T, S, J)			[2]	
Employer identification number			[3]	
Business name		<u> </u>	[5]	
Principal business/profession			[6]	
Business code			[11]	
Business address, if different from home	address on Organizer Form ID:1040		וייו	
	address on Organizer Form ID. 1040			
Address	-		[14]	
City/State/Zip	[1	5][16]	[17]	
Accounting method (1 = Cash, 2 = Accrual, 3 = C	Other)	_	[18]	_
If other:			[20]	
Inventory method (1 = Cost, 2 = LCM, 3 = Other)			[21]	_
If other enter explanation:				
			[23]	
Enter an explanation if there was a chang	ge in determining your inventory:		•	
zmor am explanation in there may a origing			[24]	
-			اج_ا	
Did you "motorially portionate" in this bus	singer 2 ov N			
Did you "materially participate" in this bus			[25]	_
If not, number of hours you did signifi			[27]	
Mark if you began or acquired this busine		_	[29]	
Did you make any payments in 2011 that	require you to file Form(s) 1099? (Y, N)	_	[30]	
If "Yes", did you or will you file all req	uired Forms 1099? (Y, N)		[31]	
Mark if this business is considered related	d to qualified services as a minister or r	eligious worker	[32]	
Did you receive wages as a statutory emp	oloyee or as a minister? (1 = Statutory emplo		[34]	_
Medical insurance premiums paid by this	-	+		_
Long-term care premiums paid by this ac	-		[39]	
Amount of wages received as a statutory			[42]	
Amount of wages received as a statutory	cripioyee	'	[42]	
		<u> </u>		
	Business In	come		
	Business In			Prior Voor Information
		come 2011 Information		Prior Year Information
Merchant card and third party network red		2011 Information		Prior Year Information
Merchant card and third party network red		2011 Information	[47]	
		2011 Information +	<u>[</u> 47]	Prior Year Information
	ceipts and sales (from Form 1099-K)	2011 Information +	<u>[</u> 47]	
	ceipts and sales (from Form 1099-K)	2011 Information + + +	<u>[</u> 47]	
Gross receipts and sales not from mercha	ceipts and sales (from Form 1099-K)	2011 Information + + + + + +	[47] [49]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K)	2011 Information + + + + + +	[47]	
Gross receipts and sales not from mercha	ceipts and sales (from Form 1099-K)	2011 Information + + + +	[47] - - [49] [52]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K)	2011 Information + + + +	[47] - [49] [52]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K)	2011 Information +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K)	2011 Information + + + +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K)	2011 Information +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K)	2011 Information  +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances Other income:	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances Other income:	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  + + + +  \$ Sold  2011 Information +	[47] [49] [52]	
Gross receipts and sales not from mercha Returns and allowances Other income:  Beginning inventory	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54]	
Gross receipts and sales not from merchange Returns and allowances Other income:  Beginning inventory Purchases	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54]	
Gross receipts and sales not from merchange Returns and allowances Other income:  Beginning inventory Purchases	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52]	Prior Year Information
Gross receipts and sales not from merchange Returns and allowances Other income:  Beginning inventory Purchases Labor:	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54] [56] [58]	
Gross receipts and sales not from merchal Returns and allowances Other income:  Beginning inventory Purchases Labor:  Materials	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52]	Prior Year Information
Gross receipts and sales not from merchange Returns and allowances Other income:  Beginning inventory Purchases Labor:	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54] [56] [58]	Prior Year Information
Gross receipts and sales not from merchal Returns and allowances Other income:  Beginning inventory Purchases Labor:  Materials	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54] [56] [68]	Prior Year Information
Gross receipts and sales not from mercha Returns and allowances Other income:  Beginning inventory Purchases Labor:  Materials	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54]	Prior Year Information
Gross receipts and sales not from merchal Returns and allowances Other income:  Beginning inventory Purchases Labor:  Materials	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54]	Prior Year Information
Gross receipts and sales not from mercha Returns and allowances Other income:  Beginning inventory Purchases Labor:  Materials	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54]	Prior Year Information
Gross receipts and sales not from merchal Returns and allowances Other income:  Beginning inventory Purchases Labor:  Materials	ceipts and sales (from Form 1099-K) ant cards and third party networks	2011 Information  +	[47] [49] [52] [54]	Prior Year Information

Form	ID.	C-

# Schedule C - Expenses

Form ID: C-2

Freparer use or	-					
Principal business or profess				2011 Information	-	Drior Voca Information
Advertising			+	2011 Information	[6]	Prior Year Informatio
Car and truck expenses					_[6] [8]	
Commissions and fees			· +		_ <sup>[0]</sup> [10]	
Contract labor			· +	•	_[10] [12]	-
Depletion			·		_	
Depreciation			· +		_[16]	
Employee benefit programs	(Include Small Employer H	ealth Insurance Premiums	credit).		_[10]	-
imployed beliefit programs	(moldae email Employer 11		4		[18]	
			· +		_[10]	
nsurance (Other than health	):				_	
Touranto (Ouror unan mount	<i>,</i> .		+		[20]	
			+		_[=0]	
nterest:					_	-
Mortgage (Paid to banks, e	etc.)		+		[22]	
Other:	,					
			+		[24]	
			+		_	•
egal and professional service	ces		+		[26]	
Office expense			+		_[28]	
Pension and profit sharing:					<u>.</u> .	
,			+		[30]	
			+			
Rent or lease:					_	
Vehicles, machinery, and	d equipment		+		[32]	
Other business property			+		[34]	
Repairs and maintenance					[36]	
Supplies			+		[38]	
Taxes and licenses:						
			+		[40]	
			+			
			+			
			+			
			+		_	
ravel, meals, and entertainn	ment:				_	
Travel			+		[42]	
Meals and entertainment			+		 [44]	
Meals (Enter 100% subje	ect to DOT 80% limit)		+		<b>-</b> [46]	
Itilities	· ·		+		<b>[</b> 50]	
Vages (Less employment cr	redit):				_	
			+		[52]	
			+		_	
Other expenses:					_	
			+		[54]	
			+		_	
			+			
			+		_	
			+		_	
<del></del>	Preparer use only					
Γ	Carryovers	Regular		AMT		
	Operating	+	[61]	+	[62]	
	Schedule D - Short-term	+	[63]	+	[64]	
	Schedule D - Long-term	+	[65]	+	[66]	1
	Schedule D - 28% rate	+	[67]	+	[68]	1
	Form 4797 - Part I	+	[69]	+	[70]	1
	Form 4797 - Part II	·   +	[71]	+	[72]	1

[75]

Section 179

Form ID: Rent and Royalty Property - General Information 25				
Preparer use only		2011 Information	Prior Year Information	
Taxpayer/Spouse/Joint (T, S, J)		[3]		
Description		[2]		
Address		[8]		
State postal code		[4]		
$\label{eq:type} Type \ (1 = Single-family, \ 2 = Multi-family, \ 3 = Vacation/short-term, \ 4 = Commercial, \ 5 = Land, \ 6 $	6 = Royalties, 7 = Self-rental, 8	= Other)[9]		
Description of other type (Type code #8)		[10]		
Fair rental days (If not full year) (For types 1, 2, 4, 5, 7 and 8 only) (Use Rent-2 for type 3)		[11]		
Percentage of ownership if not 100% Business use percentage, if not 100% (Not vacation home percentage)		[13]		
		[15]		
Rent and F	Royalty Income	!		
	2011 Information		Prior Year Information	
Merchant card and third party payments (from Form 1099-K)	+			
Rents and royalties NOT from merchant cards/third party payments	+	[25]		
Rent and Ro	oyalty Expense	S		
	2011 Information		6 Prior Year Information	
Advertising	+			
Auto -	+			
Travel -	+			
Cleaning and maintenance - Commissions:	<u> </u>	[37][38]		
Gorinissions.	+	[40] [42]		
	' +	[40][42]		
Insurance:	-	_		
	+	[43] [45]		
	+	<u> </u>		
Legal and professional fees	+	[46][47]		
Management fees:				
	+	[49][51]		
Martage interest poid to health ata (Form 1000)	+			
Mortgage interest paid to banks, etc (Form 1098)  Other mortgage interest	<u> </u>	[52] [53] [55] [57]		
Qualified mortgage insurance premiums	+ 	[55][57] [58] [59]		
Other interest:	·	[00]		
	+	[61] <u>[63]</u>		
	+			
Repairs	+			
Supplies	+	[67][68]		
Taxes:				
	<u> </u>			
	+		-	
Utilities	+ 			
Depreciation -	+			
Depletion -	· +	[79] [80]		
Other expenses:				
<u> </u>	+	[82]		
	+			
	+			
	+			
Defining a state a state of	+			
Refinancing points paid this year:  Description				
Total points paid/Current amort (Prep use only)	+	[86]		
Date of Refinance  Total # Payments		ed on 1098 in 2011		
Control Totals +		<u> </u>	Form ID: Rent	

Form ID: Rent-2 Rent and Preparer use only Description		es -	Vacation Home, Pa	ssive and Other	Information 26
	Va	cati	on Home Information	on	
Number of days home was use Number of days home was ren Number of day home owned, if Carryover of disallowed operati Carryover of disallowed depred	ted not 365 ing expenses into 2011		2011 Information	[6] [8] [10] [20] [21]	Prior Year Information ————————————————————————————————————
	Pa	assiv	e and Other Inform	ation	
Preparer use only Carryovers	Regular		АМТ	٦	
Operating	+	[27]	+ [28	<u> </u>	
Schedule D - Short-term	+	[29]	+ [30	0]	
Schedule D - Long-term	+	[31]	+ [32	2]	
Schedule D - 28% rate	+	[33]	+ [34	1]	
Form 4797 - Part I	+	[35]	+ [36	5]	
Form 4797 - Part II	+	[37]	+ [38	RI	

[40]

[39]

[41]

#### **NOTES/QUESTIONS:**

Comm revitalization

Section 179

Control Totals + Form ID: Rent-2

Form ID: A-1

## Schedule A - Medical and Dental Expenses

	2011 Inforr		Prior Year Inform
Medical and dental expenses, such as: Doctors, Dentists, Nurses, Hospital and	_	-	
and surgical supplies, Hearing aids, Guide dogs, Eyeglasses and contact lens	ses, and Insurance reimburseme	nts received	
	+	[2]	
-	+		
	+		
	+		
	+		
	+		
Medical insurance premiums you paid*:			
	+	[5]	
-			
Long torm one promiume you paid*.	+		
Long-term care premiums you paid*:			
	+		
	+		
Prescription medicines and drugs:			
	+		
Miles driven for medical items (1/1/11 to 6/30/11)[14]	(7/1/11 to 12/31/11)	[17]	
Schedule A - Ta	ax Expenses		
	2011 Inforr	nation	Prior Year Inform
State/local income taxes paid:	<u> </u>	nation	Prior Year Inform
State/local income taxes paid:	2011 Inform	ſ	Prior Year Inform
	2011 Inform	<u>[</u> [19]	Prior Year Inform
State/local income taxes paid:	2011 Inform	[19]	Prior Year Inform
State/local income taxes paid:	2011 Inform	<u>[</u> 19]	Prior Year Inform
State/local income taxes paid:	2011 Inform	<u>[</u> 19]	Prior Year Inform
State/local income taxes paid:	2011 Inform	<u>[</u> 19]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:	2011 Inform	<u>[</u> 19]	Prior Year Inform
State/local income taxes paid:	2011 Inform	[19] 	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:	2011 Inform	[19] 	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:	2011 Inform	[19] 	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:	2011 Inform	[19]  [22]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:	2011 Inform	[19] [22]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:	2011 Inform	[19] [22]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:	2011 Inform	[19]  [22]  [25]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:	2011 Inform	[19]  [22]  [25]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:	+	[19]  [22]  [25]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:	2011 Inform	[19][22][25][28]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:	+	[19][22][25][28]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes	2011 Inform	[19] [22] [25] [28]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes	2011 Inform	[19] [22] [25] [28] [31]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes	2011 Inform	[19] [22] [25] [28]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes	2011 Inform	[19] [22] [25] [28]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes  Sales tax paid on major purchases:	2011 Inform	[19][22][25][28][31]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes	2011 Inform	[19][22][25][28][31][37]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes  Sales tax paid on major purchases:	2011 Inform	[19][22][25][28][31][37]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes  Sales tax paid on major purchases:	2011 Inform	[19][22][25][28][31][37]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes  Sales tax paid on major purchases:	2011 Inform	[19] [22] [25] [28] [31]	Prior Year Inform
State/local income taxes paid:  2010 state and local income taxes paid in 2011:  Real estate taxes paid:  Personal property taxes:  Other taxes, such as: foreign taxes and State disability taxes  Sales tax paid on major purchases:  Sales tax paid on actual expenses:	2011 Inform	[22] [22] [25] [28] [31] [37]	Prior Year Inform

Form ID: A-2	Interest Expenses
	INTOTACT FYNANCAC

Form I	ID: A-2	Inter	est Expens	ses			50
Γ/S/J	Home mortgage interest: From Form 1098		2011 Information	Type*	Percentage (XXX.XX)	Mortgage Ins. Premiums Paid	Prior Year Information
_[1]_		+_		[2]	+	·	
		+_		- —		·	
		+_		- —		·	
		_+_		- —		<u> </u>	
		+_			+	·	
		+_		- —	+	·	
_		+ _		- —		<u> </u>	
		_+-		- —		·	
		_+-		- —		· l	
			*Mortgage Typ	es			
1	lank = Used to buy, build or improve main/qualified = Not used to buy, build, improve home or investme = Used to pay off previous mortgage		l home 3 = l	Jsed to			ess proceeds invested home used by taxpayer
T/0/	Name		001		0044 1-15-		5. V 16 0

T/S/J	Name Other, such as: Home mortgage interest paid to individuals	SSN	2011 Information	Prior Year Information
[4]			+ [5]	
	ress		1. [9]	
	•		+	
Add	ress			
			+	
Add	ress	1		
			+	
Add	ress			
T/S/J —	Street Address	• •		-
Refina	ncing Points paid in 2011 - Taxpayer/Spouse/Joint (T, S, J) Description		[11]	
	Total points paid			
	Percentage of principal exceeding original mortgage (For	AMT adjustment)		
	Points paid in 2011 (Preparer use only)		+[12]	
	Date of refinance Total number of payments			
	Reported on Form 1098 in 2011			
	Taxpayer/Spouse/Joint (T, S, J)		_	
	Description		_	
	Total points paid			
	Percentage of principal exceeding original mortgage (For	AMT adjustment)		
	Points paid in 2011 (Preparer use only)	,		
	Date of refinance			
	Total number of payments			
	Reported on Form 1098 in 2011		<u></u>	
T/S/J			2011 Information	
	Investment interest expense, other than on Schedule(s) K-1	1:		
[14]	_		+[15]	
_			+	
_			+	
_			+	
_			+	
_			+	
_			+	
_			+	

Control Totals +

Form ID: A-2

## **Charitable Contributions**

T/S/J		2011 Information	<b>Prior Year Information</b>
Contributions made by cash or check (including or	ut-of-pocket expenses)	•	
[2]	+	[3]	
_	+		
_	+ <u></u>		
_	+		
_	+		
_	+		
_	+		
_	+		
- Mahartana arilan dakan	+ <u></u>		
[5] Volunteer miles driven Noncash items, such as: Goodwill/Salvation Army	Other elething or household goods	[6]	
-	Other clothing of flouseriola goods	[9]	
[8]		[a]	
_			
_	+		
_	+		
_			

## **Miscellaneous Deductions**

Unreimbursed expenses, such as: Uniforms, Professional dues, Business publications, Job seeking expenses, Educational expenses    11	S/J	2011 Informa	ation Prior Year Information
Union dues:  [14]	Unreimbursed expenses, such as: Uniforms, Profess	sional dues, Business publications, Job seeking e	expenses, Educational expenses
Union dues:  [14]	_[11]	+	[12]
Union dues:  [14]	<u>-</u>	+	
Union dues:  [14]	<u> </u>	+	
Union dues:  [14]		+	
14	<u> </u>	+	
17] Tax preparation fees	Union dues:		
17  Tax preparation fees	_ [14]	+	[15]
Other expenses, subject to 2% AGI limitation, such as: Legal/accounting fees, custodial fees  +	<u> </u>	+	
20	[17] Tax preparation fees	+	[18]
+	Other expenses, subject to 2% AGI limitation, such a	s: Legal/accounting fees, custodial fees	
23] Safe deposit box rental	[20]	+	[21]
23] Safe deposit box rental		+	
[23] Safe deposit box rental Investment expenses, other than on Schedule(s) K-1:  [26] + [27] + [27] + [27]  Other expenses, not subject to the 2% AGI limitation:  [30] + [31] + [31] + [31]  Gambling losses: (Enter only if you have gambling income)		+	
Investment expenses, other than on Schedule(s) K-1:  [26]		+	
Cambling losses: (Enter only if you have gambling income)   +	[23] Safe deposit box rental	+	[24]
Other expenses, not subject to the 2% AGI limitation:     31  +	Investment expenses, other than on Schedule(s) K-1:	:	
Other expenses, not subject to the 2% AGI limitation:  [30] + [31	[26]	+	[27]
Gambling losses: (Enter only if you have gambling income)		+	
Gambling losses: (Enter only if you have gambling income)		+	
Gambling losses: (Enter only if you have gambling income)	Other expenses, not subject to the 2% AGI limitation:		
Gambling losses: (Enter only if you have gambling income)	[30]	+	[31]
Gambling losses: (Enter only if you have gambling income)		+	
Gambling losses: (Enter only if you have gambling income)		+	
Gambling losses: (Enter only if you have gambling income)			
	Gambling losses: (Enter only if you have gambling in		
+	[33]	+	[34]
	-	+	

Control Totals +	Form ID: A-3

Form ID: 2106-2 Employee Business Expenses 54				
Preparer use only Taxpayer/Spouse (T, S) Occupation in which expenses were incurred State postal code	<u>-</u>			
Vehicle Questions				
If you used your automobile for work purposes, please answer the following questions:  Was the vehicle available for off-duty personal use? (Y, N, Blank = Not applicable)  Was another vehicle available for personal use? (Y, N)  Do you have evidence to support your deduction? (1 = Yes - written, 2 = Yes - not written, 3 = No)	2011 Information [7][9][11]  Prior Year Information			
Vehicles #1 and #2 Actual Expen	ses			
Vehicle 1 description Comments Vehicle 2 description Comments	[44]			
Date vehicle placed in service Total mileage Business mileage from 1/1/11 to 6/30/11 Business mileage from 7/1/11 to 12/31/11 Average daily round trip commuting mileage Total commuting mileage Gasoline, oil, repairs, insurance, etc. Vehicle rentals Inclusion amount (Preparer use only) Value of employer-provided vehicle Depreciation  Prior Year Informati	on Vehicle 2 Prior Year Information  [47] [49] [51] [53] [54] [56] + [58] + [60] + [62] + [68] + [70]			
Vehicles #3 and #4 Actual Expen	ses			
Vehicle 3 description  Comments  Vehicle 4 description  Comments				
Date vehicle placed in service Total mileage Business mileage from 1/1/11 to 6/30/11 Business mileage from 7/1/11 to 12/31/11 Average daily round trip commuting mileage Total commuting mileage Gasoline, oil, repairs, insurance, etc. Vehicle rentals Inclusion amount (Preparer use only) Value of employer-provided vehicle Depreciation  Vehicle 3 Prior Year Informati [78] [80] [82] [82] [85] [87] [87] [89] [99] [99] [99] [101]  NOTES/QUESTIONS:	Vehicle 4   Prior Year Information			

Control Totals +	Form ID: 2106-2

Form ID: 8829 Home	Office General Inf	ormation	61				
Preparer use only							
Principal business or profession			[3]				
Taxpayer/Spouse/Joint (T, S, J)			[4]				
State postal code			; · [5]				
			·				
Business Use of Home							
		2011 Information	Duian Vaan Information				
Total area of home		<b>2011 Information</b> [11]	Prior Year Information				
Area used exclusively for business		[13]					
Information for day-care facilities only:							
Total hours used for day-care during this year		[15]					
Total hours used this year, if less than 8,760		[17]					
Special computation for certain day-care facilities:							
Area used regularly and exclusively for day-care busine	ess	[19]					
Area used partly for day-care business		[21]					
List as direct expenses any expense							
List as indirect expenses any expenses wh	ich are attributable to the o	verall upkeep and running of	your nome.				
	2011 Info	rmation	Prior Year Information				
	Direct Expenses	Indirect Expenses					
Mortgage interest +	[26]	+[27]					
Mortgage insurance premiums +	[29]	+[30]					
Real estate taxes +	[32]	+[33]					
Excess mortgage interest and insurance premiums +	[35]	+[36]					
	[38]	+[39]					
	[41]						
	[44]	+[45]					
	[47]	+[48]					
Other expenses, such as: Supplies & Security system	[50]	[54]					
+		+[51] +					
		+					
+		+					
+		+					
+		+					
+		+					
		+					
+		+					
Excess casualty losses		+[53]					
Carryovers:							
Operating expenses		+[54]					
Casualty losses		+[55]					
Depreciation		+[57]					
Business expenses not from business use of home, such a							
Travel, Supplies, Business telephone expenses	+[58]						
Depreciation		+[62]	-				
NOTES/QUESTIONS:							

Control Totals +

Form ID: 8829

Form ID: CT Connecticut General Information					
Mark if tax fo	orms, instructions	and booklet not wanted next year			[1]
		Amount of contributions	you wish to make to:		
AIDS Resea	ırch	[2	Breast Cancer Research	ch	[5]
Organ Trans	splant	[3	Safety Net Services		[6]
Endangered	Species/Wildlife	Fund[4	Military Family Relief		[7]
		Use Tax In	formation		
	U	se Tax-Enter any out-of-state purchases made	de on which sales tax w	as not paid to the sell	er:
Purchase 1	Description			Date of purchase	[8]
	Retailer/Service	Provider:		Purchase price	
	Type Code:			Out of state tax paid	
Purchase 2	Description			Date of purchase	
	Retailer/Service	Provider:		Purchase price	
	Type Code:			Out of state tax paid	
		Use Tax T	ype Codes		
		1 = Computer processing	3 = General (July	1st and after)	
		2 = General (Pre July 1st)	4 = Luxury		
		Property Tax	Information		
		Enter property taxes paid on prim	ary residence and/or mo	otor vehicle:	
•	•	1 (Enter street address)(Resident only)			[9]
	•	ake and model)(Resident only)	-		[10]
Auto 2 Desc	ription (Enter year, m	ake and model)(MFJ Resident only)			[11]
		Name of CT Tax Town or District	Date Paid	Date Paid	Amount Paid
Primary Res	idence (Resident only	y)[12]	[13]	[14]	
Auto 1 (Reside			[16]		[18]
Auto 2 (MFJ R	Resident only)		[20]		[22]
		Dowl wood Doolds			
		Part-year Reside	nt information		
	If	you were a part-year resident during the ta	x year, enter the dates y		
				Taxpayer	Spouse
Enter resider	ncy dates:				
From 				[23]	[25]
To	,			[24]	[26]
• •		d into Connecticut, 2 = Moved out of Connecticut)		[27]	[30]
-		nnecticut sources during nonresident period? (Y	′, N)	[28]	[31]
State of prior	r or new residence	9		[29]	[32]
	Enter the f	ollowing amounts only if you do NOT know	the exact amount of yo	ur Connecticut source	information
Basis for cal	lculating apportion	ment (1 = Working days, 2 = Sales, 3 = Mileage)	•		[33]
	•	outside Connecticut			[34]
	,	inside Connecticut			[35]
	days (holidays, w				[36]
_	e being apportione				[37]
					, ,
NOTES/Q	UESTIONS:				

Form ID: CT