

2011 INCOME TAX ORGANIZER

GETTING READY: Gather all copies of your W-2's, 1099, 1098 and other tax documents sent to you by employers, government agencies, financial institutions and child care providers. Please use this organizer as a guide to get your tax paperwork ready. The information is essential to having an accurate return prepared. If I did not prepare your return last year, please include a copy of your 2010 return. In order to take advantage of direct deposit, I will need the name of your bank or credit union, routing number, account number, and whether it is checking or savings. A voided check (no deposit slips please) is usually helpful. **Please do not send any sales receipts with your tax information.** Just provide me with the totals.

NAME _____
DOB _____ SS# _____
Address _____ _____
Home Phone _____ Cell _____
Job Title _____
E-mail _____

Dependent children and Spouse are the same as 2010: (Please check box) <input type="checkbox"/>

Spouse _____
DOB _____ SS# _____
Job Title _____
Cell phone _____

<u>Dependents only:</u>	
Child _____	DOB _____ SS# _____
Child _____	DOB _____ SS# _____
Child _____	DOB _____ SS# _____
Child _____	DOB _____ SS# _____

<u>Child Care Expenses</u>
Provider _____
Address/Phone _____ _____
Tax ID# _____
Amount Paid _____

<u>College Tuition Credit</u> (Qualified expenses for undergrads include tuition, books and computers)	
Student _____	Undergrad? Yes/No Qualified expenses _____
Student _____	Undergrad? Yes/No Qualified expenses _____

<u>Student Loans</u>
Total interest paid in 2011 on qualified student loans _____

OVER>

Reportable Gambling Winnings _____ Losses _____
(Please include Jackpot receipts or casino win/loss statement)

Alimony Paid _____

Recipients SS# _____

Alimony Received _____

Total Medical Expenses (if more than 7.5% of adjusted gross income). Includes co-pays, health insurance and medical and dental expenses.

Total Property Taxes Paid in 2011 (include school and county/town)

Main Residence _____

Additional Property _____

Misc. Deductions:

Union/Professional Dues \$ _____

Professional Subscriptions \$ _____

Uniforms/Shoes/Boots \$ _____

Uniform Cleaning \$ _____

Training/Job Education \$ _____

Safe Deposit Box \$ _____

Safety Equipment/Tools \$ _____

Cell Phone (business use) \$ _____

Total Business Miles _____

Other Deductions _____

NYS Volunteer Fire/Amb Credit

Taxpayer _____ Spouse _____

Fire company _____

Fire Co Address _____

Rental Property (See Rental Organizer at eptax.com)

Rent Collected _____

Taxes Pd _____ Repairs _____

Insurance _____ Adv. _____

Mortgage Interest Pd _____

Maintenance/Cleaning _____

Utilities _____ Supplies _____

Charitable Contributions

Cash _____

Property _____

If value of property exceeds \$500, please supply the following information:

Organization/Date:

Address:

Property type (e.g. clothes)

Residential Energy Credit: Subject to limitations, credit is available for the purchase and installation of certain energy star compliant items, such as furnace, hot water tank, air conditioning, exterior windows and doors, and insulation.

Item _____ Date _____ Cost _____

Item _____ Date _____ Cost _____

Direct Deposit Information (Recommended)

Checking or Savings _____

Bank _____ Routing # _____ Account # _____

Please refer to www.eptax.com to print out the Rental Property Form and/or Small Business Information