



This is your "Tax Organizer" or "Checklist" for the tax year 2011 which will assist you in getting organized. Attach all relevant information to this list. (This is not an all inclusive list, please add additional information if necessary.)

- W-2 from employment income.
- Income amounts from any business done in 2011. If you use QuickBooks or other accounting software, please send back up or an accountants copy by e-mail or disk.
- Expenses for any business in 2011. Here are some common expenses for self-employed taxpayers:
 - o Auto expenses
 - o Business miles driven _____
 - o Personal miles driven _____
 - o Make and model of vehicle
 - o Legal and professional services
 - o Office Expenses
 - o Supplies
 - o Cell Phone expense
 - o Equipment
 - o Taxes & Licenses
 - o Travel expense
 - o Meals Expense
 - o Uniforms and/or dry-cleaning
- Please list rental property income and expenses for each property owned. Did you actively participate in the management of the rentals or hire a management company?
 - o Insurance Expense
 - o Advertising
 - o Travel
 - o Cleaning & Maintenance
 - o Legal & Professional Fees
 - o Management Fees
 - o Mortgage Interest paid on Loan
 - o Property Taxes
 - o Repairs
 - o Supplies
 - o Utilities
 - o Appliances (date and amount)
 - o Remodel Expenses
- Forms 1099-INT, 1099-DIV and 1099-B (investment income)
 - o If there is activity on form 1099-B, please include purchase date and purchase price of items sold.
- List the total amount of tuition, books, and fees paid in 2011 to an educational institution.
- List any retirement plan contributions.
- List any expenses you paid personally for the benefit of your employer that you were not reimbursed for (i.e. Uniforms? Cell phone? Office Supplies? Trips? Licenses? Fees?)
- Any retirement distributions? Disability? Social Security? Please attach documentation.
- Detailed list of medical expenses (i.e. prescription totals, co-pays and miles driven to appointments, eye glasses, contacts, etc.)
- Form 1098 – mortgage interest statement(s) along with property taxes paid in 2011.
- List of gifts by cash or check to charitable organizations.
- List of gifts other than by cash or check. (i.e. Goodwill) Please include dates and list of items given.

- If you are due a refund, would you like your refund to be direct deposited to your checking or savings account?
Routing # _____ A/C# _____
- Or, check here to use same account on file from last year.
- Please check this box if you would like to e-file your federal and/or state tax return for a quicker return (no extra charge).
- Please check this box if you prefer not to receive a paper copy of your return but prefer and electronic version on disk or via e-mail.
- List of Federal and State tax estimated tax payments made for the 2011 tax year including dates paid.

Please call or e-mail my office if I can be of any further assistance. Thank you, Katy