2011	1040	US	Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2011,
please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes	No	
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Could you be claimed as a dependent on another person's tax return for 2011?

DEPENDENTS

Yes	No	
☐	☐	Were there any changes in dependents?
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2011?
☐	☐	Did you have any children under age 19 or full-time students under age 24 at the end of 2011, with interest and dividend income in excess of $950, or total investment income in excess of $1,900?

INCOME

Yes	No	
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
☐	☐	Did you receive any disability income?
☐	☐	Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

Yes	No	
☐	☐	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
☐	☐	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
☐	☐	Did you buy or sell any stocks, bonds or other investment property in 2011?

2011	1040	US	Miscellaneous Questions

☐ ☐ Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2012?

☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

☐ ☐ Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

☐ ☐ Did you purchase a new alternative motor vehicle (hybrid, advanced lean burn, fuel cell, plug-in)?

☐ ☐ Did you have any debts cancelled or forgiven?

☐ ☐ Does anyone owe you money which has become uncollectible?

RETIREMENT PLANS

☐ ☐ Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ ☐ Did you transfer or rollover any amount from one retirement plan to another retirement plan?

☐ ☐ Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?

EDUCATION

☐ ☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

ITEMIZED DEDUCTIONS

☐ ☐ Did you incur a loss because of damaged or stolen property?

☐ ☐ Did you work out of town for part of the year?

☐ ☐ Did you use your car on the job (other than to and from work)?

Miscellaneous Questions (Continued)

2011 | 1040 | US | Miscellaneous Questions

ESTIMATED TAXES

☐ ☐ Did you apply an overpayment of 2010 taxes to your 2011 estimated tax (instead of being refunded)?

☐ ☐ If you have an overpayment of 2011 taxes, do you want the excess applied to your 2012 estimated tax (instead of being refunded)?

☐ ☐ Do you expect your 2012 taxable income and withholdings to be different from 2011?

MISCELLANEOUS

☐ ☐ Do you want to electronically file your tax return?

☐ ☐ Do you want to allocate $3 to the Presidential Election Campaign Fund?

☐ ☐ Does your spouse want to allocate $3 to the Presidential Election Campaign Fund?

☐ ☐ May the IRS discuss your tax return with your preparer?

☐ ☐ Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

☐ ☐ Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

☐ ☐ Was your home rented out or used for business?

☐ ☐ Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

☐ ☐ Did you incur moving expenses due to a change of employment?

☐ ☐ Did you engage the services of any household employees?

☐ ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

☐ ☐ Did you or your spouse make any gifts to an individual that total more than $13,000, or any gifts to a trust?

☐ ☐ Did you have any Use Tax related purchases in 2010?

2011 | 1040 | US | Tax Organizer

GREGORY D. BARTON CPA AND ASSOCIATES
777 E TAHQUITZ CANYON WAY STE 320
PALM SPRINGS, CA 92262-6798
Telephone number: (760) 969-6499
Fax number: (760) 325-8269
E-mail address:

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2011 tax return. Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

CLIENT INFORMATION

	Taxpayer	Spouse
First name and initial.......		
Last name.......................		
Title/suffix........................		
Social security number....		
Occupation.....................		
Date of birth (m/d/y)........		
Date of death (m/d/y)......		
1=blind............................		
Home phone...................		
Work phone....................		
Work extension...............		
Cell phone.......................		
E-mail address...............		

Address		
	In care of.....................	
	Street address............	
	Apartment number......	
	City..............................	
	State........................	
	ZIP code.....................	

DEPENDENTS

	Dependent No.	Dependent No.
First name.......................		
Last name.......................		
Title/suffix........................		
Date of birth (m/d/y)........		
Social security number....		
Relationship....................		
Months lived at home......		

WAGES, SALARIES AND TIPS

Employer Name:	2011 Amount	2010 Amount
☐ ________________	Attach Forms W-2	
☐ ________________		

INTEREST INCOME

Payer Name:		
☐ ________________	Attach Forms 1099-INT	
☐ ________________		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

DIVIDEND INCOME

Payer Name:

	2011 Amount	2010 Amount
☐ ________________	Attach Forms 1099-DIV	
☐ ________________		

PENSION AND IRA INCOME

Payer name:

☐ ________________	Attach Forms 1099-R	
☐ ________________		

GAMBLING WINNINGS

Payer name:

☐ ________________	Attach Forms W-2G	
☐ ________________		
Total gambling losses		
Winnings not reported on Form W-2G		

OTHER GOVERNMENT FORMS - INCOME

☐ Form 1099-B - Sales of stock (also include transaction history)	Attach Forms 1099	
☐ Form 1099-MISC - Miscellaneous income		
☐ Form 1099-K - Merchant card and third party network payments		
☐ Form 1099-S - Sales of real estate (also include closing statements)		
☐ Form 1099-G - State tax refunds	Attach Forms 1099	
Taxpayer:		
☐ Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐ Form 1099-G - Unemployment compensation		
Spouse:		
☐ Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐ Form 1099-G - Unemployment compensation		

MISCELLANEOUS INCOME

Alimony received		
Spouse: Alimony received		
Other:		
________________		
________________		

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer:

Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

RETIREMENT PLAN CONTRIBUTIONS (Continued)

Spouse:	2011 Amount	2010 Amount
Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)		

OTHER GOVERNMENT FORMS - DEDUCTIONS

		2011 Amount	2010 Amount
☐	Form 1098-E - Student loan interest	Attach Forms 1098	
☐	Form 1098-T - Tuition and related expenses		

ADJUSTMENTS TO INCOME

	2011 Amount	2010 Amount
Taxpayer:		
Self-employed health insurance premiums		
Educator expenses		
Expenses from rental of personal property		
Other adjustments to income:		
______		
______		
Alimony Paid - Recipient name & SSN		
______		
Spouse:		
Self-employed health insurance premiums		
Educator expenses		
Expenses from rental of personal property		
Other adjustments to income:		
______		
______		
Alimony Paid - Recipient name & SSN		
______		

MEDICAL AND DENTAL EXPENSES

	2011 Amount	2010 Amount
Prescription medicines and drugs		
Doctors, dentists and nurses		
Hospitals and nursing homes		
Insurance premiums		
Taxpayer: Long-term care premiums		
Spouse: Long-term care premiums		
Insurance reimbursements		
Out-of-pocket lodging and transportation expenses		
Number of medical miles		
Other:		
______		
______		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

TAXES PAID

	2011 Amount	2010 Amount
State income taxes - 1/11 payment on 2010 state estimate		
State income taxes - paid with 2010 state extension		
State income taxes - paid with 2010 state return		
State income taxes - paid for prior years and/or to other states		
City/local income taxes - 1/11 payment on 2010 city/local estimate		
City/local income taxes - paid with 2010 city/local extension		
City/local income taxes - paid with 2010 city/local return		
State and local sales taxes paid (except autos and special items)		
Use taxes paid on 2011 purchases		
Use taxes paid on 2010 state return		
Sales tax on autos not included above		
Sales taxes paid on boats, aircraft and other special items		
Real estate taxes - principal residence		
Real estate taxes - property held for investment		
Foreign income taxes		
Other:		
☐ Personal property taxes (including automobile fees in some states)	Attach Tax Notice	

INTEREST PAID

	2011 Amount	2010 Amount
Home mortgage interest and points paid		
☐	Attach Forms 1098	
☐		
Home mortgage interest not on Form 1098 (include name, SSN, & address of payee)		
Points not reported on Form 1098		
Mortgage insurance premiums on post 12/31/06 contracts		
Investment interest (interest on margin accounts):		
Passive Interest		

CASH CONTRIBUTIONS

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

	2011 Amount	2010 Amount
Volunteer Expenses (out-of-pocket)		
Number of charitable miles		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better.
In addition, a deduction for any item with minimal monetary value may be denied.

	2011 Amount	2010 Amount

MISCELLANEOUS DEDUCTIONS

	2011 Amount	2010 Amount
Union and professional dues		
Tax return preparation fee		
Safe deposit box rental		
Investment expenses		
Estate tax, section 691(c)		
Unreimbursed employee expenses:		
Other:		