

**2011 Tax Worksheet - Please fill out and bring to your appointment!**

**Taxpayer/Spouse Name** \_\_\_\_\_ **Birthdate** \_\_\_\_\_ **Social Security # (please verify)** \_\_\_\_\_ **Occupation** \_\_\_\_\_

**NEW ADDRESS (if any)** \_\_\_\_\_  
**PHONE NUMBERS** Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_ Fax \_\_\_\_\_  
 Email: \_\_\_\_\_

**DEPENDENTS (if new client, list all; otherwise, list changes from last tax year):**

Name	Birthdate	Social Security # (please verify)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

<b>SOURCES OF INCOME:</b>	Gross	Federal Tax	State Tax
W-2 _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Total W-2	\$ _____	_____	_____
1099-R _____	_____	_____	_____
Soc. Security _____	_____	_____	_____
1099-MISC _____	_____	_____	_____
_____	_____	_____	_____
Unemployment _____	_____	_____	_____
State Tax Refund _____	_____	_____	_____
Alimony Received _____	_____	_____	_____
Gambling Winnings (1099-G) _____	_____	_____	_____
Other _____	_____	_____	_____
Total Tax Withheld	_____	\$ _____	\$ _____

**2011 ESTIMATED TAX PAYMENTS:**

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter
Date Paid:	_____	_____	_____	_____
Amount Paid:	_____	_____	_____	_____
Total Amount: \$	_____			

**INTEREST INCOME:**

_____	\$ _____
_____	\$ _____
_____	\$ _____

**DIVIDEND INCOME:**

_____	\$ _____
_____	\$ _____
_____	\$ _____

**SPECIAL ADJUSTMENTS:**

IRA Deposits	\$ _____
Roth IRA Deposits	\$ _____
Keogh/SEP Deposits	\$ _____

Alimony Paid	\$ _____
Name: _____ SSN: _____	
Educator Out-of-Pocket Expenses	\$ _____
Early Withdrawal Penalties	\$ _____
<b>EDUCATION DEDUCTIONS/CREDITS:</b>	
Student Loan Interest	\$ _____
Tuition (listed by individual)	\$ _____
Freshman/Sophomore	\$ _____
Junior/Senior	\$ _____
Required Books & Supplies	\$ _____
Other	\$ _____

Taxpayer Name: _____	<b>2011</b>
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**Please mark preferred method of receiving your copy of the tax returns:**

*Electronic (pdf)*

*Paper*

**PICK UP**                      **MAIL**