Personal Information

Taxpayer:

First Name and Initial ______ Last Name ______ Social Security Number ______

Occupation ______ Date of Birth (Mo/Da/Yr) ______ Date of Death (Mo/Da/Yr) ______

Spouse:

First Name and Initial ______ Last Name ______ Social Security Number ______

Occupation ______ Date of Birth (Mo/Da/Yr) ______ Date of Death (Mo/Da/Yr) ______

Contact Information:

Street Address ______ Apartment Number ______

City ______ State ______ ZIP or Postal Code ______

Province or County ______

Foreign Country ______

Taxpayer Daytime/Work Phone ______ Spouse Daytime/Work Phone ______

Taxpayer Evening/Home Phone ______ Spouse Evening/Home Phone ______

Taxpayer Cell Phone ______ Spouse Cell Phone ______

Taxpayer Fax Number ______ Spouse Fax Number ______

Taxpayer Email Address ______

Spouse Email Address ______

Preferred Method of Contact ______

	Yes	No
May the IRS or other taxing authority discuss the return with the preparer?		
Is the taxpayer claimed as a dependent on someone else's tax return?		

	Taxpayer		Spouse	
	Yes	No	Yes	No
Are you considered legally blind per IRS regulations?				
Do you want to contribute to the Presidential Election Campaign Fund?				

Questions (Page 1 of 4)

For any question answered Yes, please attach supporting detail or documents.

Personal Information:

	Yes	No
Did your marital status change during 2012?		
If married, do you and your spouse want to file separate returns?		
Did your address change during 2012?		
Can you or your spouse be claimed as a dependent by another taxpayer?		

Dependents:

	Yes	No
Were there any changes in dependents from the prior year? Note: Include non-child dependents for whom you provided more than half the support		
Did you pay for child care while you worked or looked for work?		
Do you have any children under age 18 with unearned income more than $950?		
Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $950?		
Did you adopt a child or begin adoption proceedings during 2012?		

Purchases, Sales and Debt:

	Yes	No
Did you have any debts canceled, forgiven or refinanced during 2012?		
Did you start a new business, purchase a new rental property, farm or acquire any new interest in any partnership or S corporation during 2012?		
Did you sell an existing business, rental property, farm or any existing interest in a partnership or S corporation during 2012?		
Did you sell, exchange or purchase any real estate in 2012? If so, please attach closing statements.		
Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?		
Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan?		
Did you pay any student loan interest in 2012?		
Are your total mortgages on your first and/or second residence greater than $1,000,000? If so, please provide the principal balance and interest rate at the beginning and the end of the year.		
Did you have an outstanding home equity loan at the end of 2012? If so, please provide the principal balance and interest rate at the beginning and end of the year.		
Did you take out a home equity loan in 2012?		
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?		
Did you or your mortgagee receive any mortgage assistance payments? If Yes, enclose and Forms 1098-MA.		

Purchases, Sales and Debt (continued):

	Yes	No
Did you engage in any put or call transactions? If Yes, please provide details.		
Did you close any open short sales during 2012?		
Did you sell any securities not reported on your Form 1099-B?		

Itemized Deductions:

	Yes	No
Did you contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?		
Did you incur any casualty or theft losses during the year?		
Did you make any large purchases, such as motor vehicles and boats?		
Did you incur any casualty or loss attributable to a federally declared disaster?		

Miscellaneous:

	Yes	No
Did you or your spouse have any transactions pertaining to a medical savings account (MSA) during 2012? If you received a distribution from an MSA, please include Form 1099-SA.		
Did you or your spouse have any transactions pertaining to a health savings account (HSA) during 2012? If you received a distribution from an HSA, please include Form 1099-SA.		
Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?		
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?		
In 2010 did you or your spouse convert an IRA into a Roth IRA and not elect to include the taxable amount in your 2010 taxable income?		
Did you rollover any amounts from a qualified retirement plan to a Roth IRA or Designated Roth Account and not elect to include the taxable distribution in your 2010 taxable income?		
Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?		
Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)? If Yes, include Form 1099-Q.		
Did you or your dependents incur any post-secondary education expenses, such as tuition?		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? If Yes, how many months were you covered? Months:		
Did you move to a different home because of a change in the location of your job?		
Did you pay in excess of $1,000 in any quarter, or $1,800 during the year for domestic services performed in or around your home to individuals who could be considered household employees?		
Did you receive unreported tip income of $20 or more in any month of 2012?		
Did you or your spouse receive distributions from long-term care insurance contracts? If Yes, please include Form 1099-LTC.		
Were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account or other financial account in a foreign country?		
Did you or your spouse own any foreign financial assets?		
Did you create or transfer money or property to a foreign trust?		
Did you purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle in 2012?		

Miscellaneous: (continued)

	Yes	No
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year?		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?		
Were you notified by the IRS or other taxing authority of any changes in prior year returns?		
Did you lose your job during 2012 because of foreign competition and pay for your own health insurance?		
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?		
Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters?		
Have you been an identity theft victim and have you contacted the IRS?		
If Yes, please furnish the 6-digit identity protection PIN issued to you by the IRS ______		
Did you engage in any bartering transactions?		
Did you have any work outside of the U.S. or pay any foreign taxes?		
Did you or your spouse serve in the military or were you or your spouse on active duty?		
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?		

Gifts:

	Yes	No
Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc., with a total (aggregate) value in excess of $13,000 to any individual during the year?		
Did you or your spouse make any gifts to a trust for any amount during the year?		
Do you or your spouse have a life insurance trust?		
Did you assist in the purchase of any asset (auto, home) for any individual during the year?		
Did you forgive any indebtedness to any individual, trust or entity during the year?		
Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?		

If you answered Yes to any of the above gift questions, please complete Form 34 and/or 35 in the back of the Organizer.

Severance/Retirement:

	Yes	No
Did you retire or change jobs in 2012?		
Did you receive deferred, retirement or severance compensation?		

If Yes, enter the date received (Mo/Da/Yr). Date: ______

	Yes	No
Did you or your spouse turn age 70 1/2 during the year and have money in an IRA or other retirement account while not taking any distribution?		

Miscellaneous: (continued)

	Yes	No
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year?		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?		
Were you notified by the IRS or other taxing authority of any changes in prior year returns?		
Did you lose your job during 2012 because of foreign competition and pay for your own health insurance?		
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?		
Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters?		
Have you been an identity theft victim and have you contacted the IRS?		
If Yes, please furnish the 6-digit identity protection PIN issued to you by the IRS ________		
Did you engage in any bartering transactions?		
Did you make gifts of more than $13,000 to any individual?		
Did you have any foreign income or pay any foreign taxes during 2012?		
Did you or your spouse serve in the military or were you or your spouse on active duty?		
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?		

Severance/Retirement:

	Yes	No
Did you retire or change jobs in 2012?		
Did you receive deferred, retirement or severance compensation?		

If Yes, enter the date received (Mo/Da/Yr).

Date

	Yes	No
Did you or your spouse turn 70 1/2 during the year and have money in an IRA or other retirement account while not taking a distribution?		

Sale of Your Home:

Did you sell your home in 2012? ☐ ☐

If Yes, did you receive Form 1099? ☐ ☐

If Yes, did you own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale? ☐ ☐

Did you ever rent out this property? ☐ ☐

Did you ever use any portion of the home for business purposes? ☐ ☐

Have you or your spouse sold a principal residence within the last two years? ☐ ☐

At the time of the sale, the residence was owned by the: ☐ Taxpayer ☐ Spouse ☐ Both

Additional Information:

For any trust you created or that you are trustee, have any beneficiaries died during 2012? ☐ ☐

Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2012? ☐ ☐

If Yes, enter the following:

TS	Name of Designated Beneficiary	Social Security Number	State Sponsoring Plan	Account Number	2012 Amount Contributed

Dependents and Wages

Dependent Information:

Did dependent have income over $3,800?

First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Relationship to Taxpayer	Months Lived in Your Home	X if Disabled	Yes or No

Please provide the name of any person living with you who is claimed as a dependent on someone else's tax return ______________________

Please list the years that a release of claim to exemption is given for a dependent child not living with you . . . . ______________

Wages and Salaries: Please enclose all copies of your current year Forms W-2

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER1	Medicare	State	Local

Electronic Filing: **Please enclose all copies of your current year Forms W-2**

Electronic filing is the means by which your return is transmitted directly to the IRS. The IRS has implemented an electronic filing mandate requiring certain preparers to file all returns that they prepare electronically. Some states also require certain preparers to electronically file state returns prepared. The IRS and some states allow taxpayers to elect not to file their returns electronically.

Do not electronically file the federal return . . . . ☐

Do not electronically file the state return(s) . . . . ☐

The IRS requires the use of a 5-digit self-selected Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.

Would you like to use a randomly generated PIN?	Yes	No
Taxpayer	☐	☐
Spouse	☐	☐

If No, please enter a 5-digit self-selected PIN:

Taxpayer PIN . . . . ________

Spouse PIN . . . . ________

Direct Deposit and Withdrawal

Direct Deposit and Electronic Funds Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited directly into your financial institution account, regardless of the means used to file the return. For balance due returns to be filed electronically, the IRS and many states allow the entire amount due to be paid using electronic withdrawal. If you would like to have your refund deposited directly into your account or pay a balance due by using an electronic withdrawal, please complete the following information. If you selected either direct deposit or electronic withdrawal in 2011, your account information has already been included below.

Account Information:

Account owner . . . . ☐ Taxpayer ☐ Spouse ☐ Joint

Type of account . . . . ☐ Checking ☐ Trad. Savings ☐ IRA Savings ☐ Archer MSA Savings ☐ Coverdell Ed. Savings ☐ HSA Savings

Account use (check all that apply) . . . . ☐ Business ☐ Federal return ☐ Federal estimate ☐ State(s) ☐ Direct deposit ☐ Electronic withdrawal

Name of financial institution . . . . ______________________

Routing Transit Number . . . . ______________________

Account number . . . . ______________________

If requesting electronic withdrawal:

What amount do you want withdrawn, if not the entire balance due? . . . . ____________

When should the withdrawal occur, if not the due date of the return? . . . . ____________

Account Information:

Account owner . . . . ☐ Taxpayer ☐ Spouse ☐ Joint

Type of account . . . . ☐ Checking ☐ Trad. Savings ☐ IRA Savings ☐ Archer MSA Savings ☐ Coverdell Ed. Savings ☐ HSA Savings

Account use (check all that apply) . . . . ☐ Business ☐ Federal return ☐ Federal estimate ☐ State(s) ☐ Direct deposit ☐ Electronic withdrawal

Name of financial institution . . . . ______________________

Routing Transit Number . . . . ______________________

Account number . . . . ______________________

If requesting electronic withdrawal:

What amount do you want withdrawn, if not the entire balance due? . . . . ____________

When should the withdrawal occur, if not the due date of the return? . . . . ____________

Interest Income

Interest Information:

Please enclose copies of all Forms 1099-INT or other documents for interest received

Tax-Exempt Interest Code: 1 - 1099-INT 2 - Private Activity Bond 3 - Both

TSJ	Name of Payer	Savings & Loans, Bank and Other	U.S. Bonds and Obligations	Code	Tax-Exempt Interest	2011 Interest Amount
	Total					

Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	2012 Interest Amount	2011 Interest Amount

Address of Individual to Whom Mortgage Interest Was Paid

Enter Any Additional Information:

Note: Please list all items sold during the year on Form 7.

Business Income and Cost of Goods Sold

Name of Business: . . . . ______

Principal Business or Profession: . . . ______

TSJ . . . . ______
Employer ID number . . . . ______
Street address . . . . ______
City, state and ZIP code . . . . ______
Method of inventory . . . . ______
Method of accounting . . . . ______

Business Questions for 2012:

	Yes	No
Did you dispose of this business?		
If Yes, what was the disposition date? (Mo/Da/Yr) ______		
Was there a change in determining quantities, costs or valuations between opening and closing inventory?		
Were you involved in the operations of this business on a regular, continuous and substantial basis?		
Have you prepared or will you prepare all required Forms 1099?		

	2012 Amount	2011 Amount
Health insurance premiums paid for yourself and your dependents		

Income:

Please enclose copies of all Forms 1099-K

	2012 Amount	2011 Amount
Other gross receipts or sales		
Less returns and allowances		

Cost of Goods Sold:

	2012 Amount	2011 Amount
Beginning inventory		
Purchases less cost of items withdrawn for personal use		
Cost of labor (do not include amounts paid to yourself)		
Materials and supplies		

Other Costs of Cost of Goods Sold:

Description	2012 Amount	2011 Amount
Ending inventory		

Other Income:

Description	2012 Amount	2011 Amount

Business Expenses and Property & Equipment

6A

Name of Business: . . . . ______________________________

Principal Business or Profession: . . . ______________________________

Expenses:

	2012 Amount	2011 Amount
Advertising		
Car and truck expenses		
Parking fees and tolls		
Commissions and fees		
Contract labor		
Employee benefit programs and health insurance (other than pension and profit-sharing plans)		
Insurance (other than health)		
Interest - mortgage (paid to banks, etc.)		
Interest - other		
Legal and professional fees		
Office expense		
Pension and profit-sharing plans		
Rent or lease - vehicles, machinery and equipment		
Rent or lease - other business property		
Repairs and maintenance		
Supplies (not included in Cost of Goods Sold)		
Taxes and licenses		
Travel		
Meals and entertainment		
Utilities		
Wages		
Dependent care benefits		

Other Expenses:

Description	2012 Amount	2011 Amount

Property and Equipment: Please attach a list if more space is needed

X if not new	Acquisitions - Description	Date Acquired (Mo/Da/Yr)	Cost

Dispositions - Description	Date Acquired (Mo/Da/Yr)	Cost	Date Sold (Mo/Da/Yr)	Selling Price

Business Expenses - Vehicle and Other Listed Property

Name of Business: . . . . ______________________

Principal Business or Profession: . . . ______________________

Listed Property Questions for 2012:

	Yes	No
Do you have evidence to support your deduction?		
If Yes, is the evidence written?		
Do you have evidence to support the business use percentage claimed on listed property?		
If Yes, is the evidence written?		

If you are an employer who provides vehicles for use by employees:

	Yes	No
Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees?		
Do you treat all use of vehicles by employees as personal use?		
Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles and retain the information received?		
Do you meet the requirements for qualified demonstration use by maintaining a written policy statement that prohibits vehicle use by individuals other than full-time vehicle salespersons, use for personal vacation trips, storage of personal possessions in the vehicle and limits the total mileage outside the salesperson's normal working hours?		

Vehicle:

	Vehicle 1	Vehicle 2
Description of vehicle		
Date placed in service (Mo/Da/Yr)		
Do you (or your spouse) have another vehicle available for your personal use?	☐ Yes ☐ No	☐ Yes ☐ No
Was your vehicle available for use during off-duty hours?	☐ Yes ☐ No	☐ Yes ☐ No

Mileage:	Vehicle 1 2012 Miles	Vehicle 1 2011 Miles	Vehicle 2 2012 Miles	Vehicle 2 2011 Miles
Total miles				
Total business miles				
Total commuting miles for the year				

Actual Expenses:	Vehicle 1 2012 Amount	Vehicle 1 2011 Amount	Vehicle 2 2012 Amount	Vehicle 2 2011 Amount
Gasoline, oil, repairs, insurance, etc				
Interest				
Taxes				
Fair market value of leased vehicle				
Vehicle rentals/leases				

Sales of Stocks, Securities, Capital Assets & Installment Sales

Gains or Losses from Sales of Stocks, Securities and Other Capital Assets:

Please enclose all Forms 1099-A, 1099-B, 1099-S and copies of mutual fund statements for the year

Did you have any of the following during the year?	Yes	No
Mutual fund transactions		
Exchange of any securities or investments for something other than cash		
Sales of inherited property		
Sales of any stock or stock options at a loss and purchases of the same or substantially similar stock or options 30 days before or 30 days after the sale		
Commodity sales, short sales or straddles		
Reinvestment of the proceeds of the sale of a publicly traded security into an SSBIC interest		
Reinvestment of the proceeds of the sale of qualified small business stock in other qualified small business stock		
Debts that became uncollectible		
Securities that became worthless		
Sale of any property where you will receive payments in future years		

	TSJ	Kind of Property and Description	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)	Gross Sales Price (Less Commissions)
A					
B					
C					
D					
E					
F					
G					
H					

	Cost or Other Basis	Federal Tax Withheld	State Tax Withheld
A			
B			
C			
D			
E			
F			
G			
H			

Installment Sales: **Do not include interest received in principal amount**

TSJ	Property Description	Date Sold (Mo/Da/Yr)	2012 Principal Received	2011 Principal Received

IRA, Pension, Annuity and Retirement Plan Information

Individual Retirement Account (IRA):

TS . . . . ____
Name of payer . . . . ____

IRA Questions for 2012:	Yes	No
Are you covered by an employer's retirement plan?		
If no, is your spouse covered by an employer's retirement plan?		
Do you want to limit your IRA contribution to the maximum amount deductible on your tax return?		
If no, do you want to contribute the maximum allowable amount to your IRA even though you may not qualify for an IRA deduction?		
Did you receive distributions in 2012 from a traditional IRA, Roth IRA or Qualified Education Account?		
Did you convert a traditional IRA to a Roth IRA in 2012?		
Did you use your IRA as security for a loan this year?		
Did you have any transactions with your IRA during the year?		

If Yes, please explain. ____

IRA Values, Rollovers, and Distributions: Please enclose copies of all Forms 1099-R

Total value of all traditional IRAs on December 31, 2012	
Outstanding rollovers on December 31, 2012	
IRA distributions received during 2012	
Total distributions converted to Roth IRAs	
Total retirement plans converted to Roth IRAs	

Contributions: Please enclose copies of all Forms 5498

IRA:	
Contributions in 2012 for the 2012 tax return	
Contributions in 2013 for the 2012 tax return	
Amount for 2012 you choose to be treated as nondeductible	
Roth IRA:	
Contributions made for the 2012 tax year	

Pensions and Annuities: Please enclose all Forms 1099-R and any nontaxable distribution details

TSJ	Name of Payer	2012 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	Is this a IRA?	2011 Gross Distributions

Self-Employed Retirement Plan: Please enclose copies of all Forms 1099-R

	Taxpayer Yes	Taxpayer No	Spouse Yes	Spouse No
Have you established a self-employed retirement or SIMPLE plan with deductible contributions?				
Do you want to contribute the maximum amount allowed?				

Contributions to:	Taxpayer 2012 Amount	Spouse 2012 Amount
Simplified employee pension plan		
Defined benefit plan		
Defined contribution plan		
SIMPLE plan		

Rental and Royalty Income and Expenses

Location of Property: ______________________

TSJ . . . . ____

Type of property . . . ______________________

	Yes	No
Have you prepared or will you prepare all required Forms 1099?		

	2012	2011
Ownership percentage if not 100%	%	
How many days was this property rented at fair market value?		
How many days was this property used personally (including use by family members)?		

Income:

Please enclose copies of all Forms 1099-K

	2012 Amount	2011 Amount
Rents received		
Royalties received		

Other Income:

Description	2012 Amount	2011 Amount

Expenses:

	2012 Amount	2011 Amount
Advertising		
Auto and travel		
Cleaning and maintenance		
Commissions		
Insurance		
Legal and other professional fees		
Management fees		
Mortgage interest paid to banks, etc.		
Mortgage interest paid to individuals		
Other interest		
Repairs		
Supplies		
Taxes		
Utilities		
Dependent care benefits		
Employee benefits		

Other Expenses:

Description	2012 Amount	2011 Amount

Rental and Royalty
Property and Equipment & Depletion

Location of Property: ______________________________

Property and Equipment: Please attach a list if more space is needed

Acquisitions:

X if not new	Description	Date Acquired (Mo/Da/Yr)	Cost

Dispositions:

Description	Date Acquired (Mo/Da/Yr)	Cost	Date Sold (Mo/Da/Yr)	Selling Price

Percentage Depletion Information:

Production Type	Royalty Income	
	2012 Amount	2011 Amount

Detail Depreciation

DP

Business or Activity: ______________________________

Asset #	X if not new	Description of Asset	Cost	Date Asset Was Placed in Service (Mo/Da/Yr)	If the Asset Was Sold, Please Indicate the Following	
					Date (Mo/Da/Yr)	Sales Price

200511 05-01-12

Please enclose Forms: W-2G, 1099-MISC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC, 1099-G and 1098-E

Miscellaneous Income and Adjustments:

	TSJ ____		TSJ ____	
	2012 Amount	2011 Amount	2012 Amount	2011 Amount
Taxable pensions and annuities received				
Nontaxable pensions and annuities received				
Federal withholding on pensions and annuities				
State withholding on pensions and annuities				
Unemployment compensation received				
Unemployment compensation repaid in 2012				
Social security benefits received				
Social security benefits repaid in 2012				
Medicare premiums withheld				
Tier 1 railroad retirement benefits received				
Tier 1 railroad retirement benefits repaid in 2012				
Taxable IRA distributions				
Nontaxable IRA distributions				
Total lump sum social security received				
Lump sum taxable social security				
Other federal withholding				
Other state withholding				

State and Local Income Tax Refunds:

TSJ	State	City	Tax Year	Income Tax Refund	
				State	Local

Other Income:

TSJ	Nature and Source	2012 Amount	2011 Amount

Alimony Paid or Received:

TSJ	Recipient's Name	Recipient's Social Security No.	Alimony Received?	2012 Amount	2011 Amount

Itemized Deductions - Medical and Taxes

Medical and Dental Expenses:

	TSJ	2012 Amount	2011 Amount
Prescription medicines and drugs			
Total medical insurance premiums paid (Do not include medicare premiums paid)			
Long-term care expenses			
Total insurance reimbursement			
Number of miles traveled for medical care			
Lodging			
Doctors, dentists, etc.			
Hospitals			
Lab fees			
Eyeglasses and contacts			
Cobra assistance premiums in 2012			

	2012 Amount	2011 Amount
Taxpayer long-term care insurance premiums paid		
Spouse long-term care insurance premiums paid		

Other Medical Expenses:

TSJ	Description	2012 Amount	2011 Amount

Taxes Paid: Please include copies of your tax bills

	TSJ	2012 Amount	2011 Amount
Personal property taxes paid (include vehicle taxes)			
General sales taxes paid on specified items			

Itemize real estate taxes by state.

TSJ	Real Estate Taxes	2012 Amount	2011 Amount

Other Taxes Paid:

TSJ	Description	2012 Amount	2011 Amount

If you purchased or sold your home in 2012, did you include any taxes from your closing statement in the amounts above? ☐ Yes ☐ No

Itemized Deductions - Mortgage Interest and Points

Mortgage Questions for 2012:

	Yes	No
If you purchased or sold your home, did you include any mortgage interest from your closing statement in the amount below?		
Did you refinance your home? (If Yes, please enclose the closing statement.)		
If Yes, how many years is your new mortgage loan? ________		
Did you purchase a new home or sell your former home during the year?		
If Yes, please enclose the closing statements from the purchase and sale of your new and former homes.		
If Yes, also, did you (or your spouse, if married) have an ownership interest in a principal residence in the US during the 3 year period prior to the purchase of this home?		
If Yes, did you (and your spouse, if married at the time of purchase) own and use the same home as a principal residence in the U.S. for any 5 consecutive year period during the 8 year period ending on the purchase date of the new home?		

Home Mortgage Interest Paid To Financial Institutions:

TSJ	Paid To	Did You Receive Form 1098?		2012 Amount	2011 Amount
		Yes	No		

Other Home Mortgage Interest Paid:

TSJ	Paid To		ID Number	2012 Amount	2011 Amount
	Name	Address			

Deductible Points:

TSJ	Paid To	Did You Receive Form 1098?		2012 Amount	2011 Amount
		Yes	No		

Mortgage Insurance Premiums:

Premiums paid or accrued for qualified mortgage insurance.

TSJ	2012 Amount	2011 Amount

Investment Interest Expense:

Interest paid on money you borrowed that is allocable to property held for investment.

TSJ	Paid To	2012 Amount	2011 Amount

Cash Contributions:

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than $500 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity. Attach Forms 1098-C received from the charity.

TSJ	Organization or Description of Contribution	2012 Amount	2011 Amount

TSJ	Conservation Real Property	2012 Amount	2011 Amount
	100% limit		
	50% limit		

TSJ	Description	2012 Miles	2011 Miles
	Number of miles traveled performing volunteer work for qualified charitable organizations		

Noncash Contributions Totaling Less Than or Equal to $500:

TSJ	Description of Donated Property	2012 Amount	2011 Amount

Noncash Contributions Totaling More Than $500:

Please enclose all Forms 1098-C or other documentation.

TSJ . . . . ____

Description of the donated property . . . . ____

Donee organization name . . . . ____

Donee organization address . . . . ____

Date the property was acquired by the taxpayer . . (Mo/Da/Yr) ____

Date the property was donated . . . . (Mo/Da/Yr) ____

Cost or basis of the donated property . . . . ____

Fair market value of the donated property . . . . ____

Which of the following methods was used to determine the fair market value? CAUTION: Generally, contributions in excess of $5,000 of similar property will require an appraisal (does not apply to marketable securities)

☐ Appraisal ☐ Thrift shop value ☐ Catalog ☐ Comparable sale

Other - please explain . . . . ____

Which of the following describes how this donated property was acquired?

☐ Purchase ☐ Gift ☐ Inheritance ☐ Exchange

Miscellaneous Itemized Deductions:

	TSJ	2012 Amount	2011 Amount
Union and professional dues			
Tax preparation fee			
Professional subscriptions			
Hobby expense (To extent of income)			
Safe deposit box			
Uniforms and protective clothing			
Work tools			
Gambling losses			
Estate taxes			

Other Itemized Deductions:

Examples:

- Certain legal and accounting fees
- Investment expenses
- Custodial fees
- Employment agency fees
- Certain educational expenses

TSJ	Description	2012 Amount	2011 Amount

Casualty or Theft Loss:

TSJ ____

Property description ____

Which of the following describes the type of property that sustained the casualty or theft loss?

- ☐ Personal use
- ☐ Business use
- ☐ Income producing
- ☐ Employee Use
- ☐ Personal use due to Hurricane Katrina
- ☐ Personal use attributable to a federally declared disaster between 2007 and 2009
- ☐ Personal use attributable to Midwestern disaster area
- ☐ Personal use attributable to Kansas disaster area
- ☐ Personal use attributable to insolvent or bankrupt financial institution losses on deposits

Date acquired (Mo/Da/Yr) ____

Date damaged or lost (Mo/Da/Yr) ____

Original cost or other basis ☐

Fair market value before casualty ☐

Fair market value after casualty ☐

Cost of replacement ☐

Insurance reimbursement ☐

Child/Dependent Care Expenses & Education Expenses

Child/Dependent Care Expenses:

General Information:

TSJ . . . . ____

Were you or your spouse a full time student or disabled? . . . . ☐ Yes ☐ No
Did you pay an individual for services performed in your home? . . . . ☐ Yes ☐ No

Expenses incurred in 2011 but paid in 2012 . . . . ____
Employer-provided dependent care benefits that were forfeited in 2012 . . . . ____
2011 carryover used in grace period . . . . ____

Child/Dependent Care Providers:

Provider 1:

Name . . . . ____
Street address . . . . ____
City, state and ZIP code . . . . ____
Social security number OR . . . . ____
Employer identification number . . . . ____
Telephone number (California only) . . . . ____

	2012 Amount	2011 Amount
Expenses incurred and paid in 2012		
Expenses incurred and not paid in 2012		

Provider 2:

Name . . . . ____
Street address . . . . ____
City, state and ZIP code . . . . ____
Social security number OR . . . . ____
Employer identification number . . . . ____
Telephone number (California only) . . . . ____

	2012 Amount	2011 Amount
Expenses incurred and paid in 2012		
Expenses incurred and not paid in 2012		

Qualifying Persons for Child/Dependent Care Expenses:

First Name and Initial	Last Name	Social Security Number	2012 Expenses Incurred	2011 Expenses Incurred

Higher Education Expenses for Education Credits and/or Tuition Fees Deduction:

Qualified expenses are for post-secondary education tuition and related expenses. They do not include room, board or books.

Please enclose copies of all Forms 1098-T

First Name and Initial	Last Name	Social Security Number	Grade	2012 Qualified Expenses

Federal Tax Payments

Refund Application:

If you have an overpayment of 2012 taxes, do you want the excess:

Refunded	☐ Yes	☐ No
Applied to your 2013 estimated tax liability	☐ Yes	☐ No

Federal Estimated Tax Payments:

		Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2012 1st Quarter Estimate	(Due 04-17-2012)			
2012 2nd Quarter Estimate	(Due 06-15-2012)			
2012 3rd Quarter Estimate	(Due 09-17-2012)			
2012 4th Quarter Estimate	(Due 01-15-2013)			

2011 overpayment applied to 2012 estimate ☐

Tax Planning Information for Tax Year 2013:

Do you expect any of the following to occur in 2013?	Yes	No
A change in your marital status	☐	☐
A change in the number of your dependents	☐	☐
A substantial change in your income	☐	☐
A substantial change in your withholding	☐	☐
A substantial change in deductions	☐	☐

If you answered Yes to any of the above questions, please provide details.

State and City Tax Payments

State and City Estimated Tax Payments:

TSJ ___
State/City ______________________________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2012 1st Quarter Estimate			
2012 2nd Quarter Estimate			
2012 3rd Quarter Estimate			
2012 4th Quarter Estimate			

2011 overpayment applied to 2012 estimate . . . .

Balance of prior year(s)' tax paid in 2012 plus amount paid with 2011 extensions . . . .

Estimated tax payments for 2011 paid in 2012 . . . .

State and City Estimated Tax Payments:

TSJ ___
State/City ______________________________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2012 1st Quarter Estimate			
2012 2nd Quarter Estimate			
2012 3rd Quarter Estimate			
2012 4th Quarter Estimate			

2011 overpayment applied to 2012 estimate . . . .

Balance of prior year(s)' tax paid in 2012 plus amount paid with 2011 extensions . . . .

Estimated tax payments for 2011 paid in 2012 . . . .

State and City Estimated Tax Payments:

TSJ ___
State/City ______________________________

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2012 1st Quarter Estimate			
2012 2nd Quarter Estimate			
2012 3rd Quarter Estimate			
2012 4th Quarter Estimate			

2011 overpayment applied to 2012 estimate . . . .

Balance of prior year(s)' tax paid in 2012 plus amount paid with 2011 extensions . . . .

Estimated tax payments for 2011 paid in 2012 . . . .

General Information:

Enter the amount of Internet or out of state purchases for which you did not pay sales tax:

Combine individual purchases less than $300 each per category and enter the total purchase amount.

Luxury items . . . .

Computer and data processing services . . . .

Other purchases . . . .

For any amounts entered, include the date of purchase, description, purchase price, and tax paid.

Residency Information:

	Taxpayer		Spouse	
	From (Mo/Da/Yr)	To (Mo/Da/Yr)	From (Mo/Da/Yr)	To (Mo/Da/Yr)
If you did not live in Connecticut for all of 2012:				
Enter the dates you did live in Connecticut				
List the prior/new state of residence				
Enter the state names other than Connecticut where you had income				

Nonresident and Part-Year Resident Employee Apportionment Worksheet Information:

If your employment required you to perform services both inside and outside Connecticut and you do not know the actual amount of income you earned in Connecticut and you were an employee who was compensated, complete the information below:

Basis for apportionment: Working days (1), Sales (2), Mileage (3) . . . .

Days/sales/miles outside Connecticut . . . .

Days/sales/miles inside Connecticut . . . .

Nonworking days (only to be used with working days basis for apportionment) . . . .

Total income being apportioned . . . .

Voluntary Contributions:

Enter the amount you wish to contribute on your 2012 tax return to:

AIDS Research Education Fund . . . .

Organ Transplant Fund . . . .

Endangered Species/Wildlife Fund . . . .

Breast Cancer Research Fund . . . .

Safety Net Services Fund . . . .

Military Family Relief Fund . . . .

Connecticut Higher Education Trust Information:

If you are a filing a Connecticut income tax return and are eligible to claim contributions made to a Connecticut Higher Education Trust, fill out the information below:

Account Number	Amount of 2012 Contribution

Credit for Property Taxes Paid:

If you are a Connecticut resident and have property taxes that first became due and were paid in 2012 on your primary residence and/or privately owned or leased motor vehicle, fill out the information below:

Select Property Code
1 - Primary Residence 2 - Primary Auto 3 - Married Filing Jointly - Auto 2

Name of Connecticut Tax Town or District	Description of Property If primary residence, enter street address If motor vehicle, enter year, make and model	Date Paid (Mo/Da/Yr)	Amount Paid	Prop. Code

Enter Any Additional Connecticut Information: