

CYA Confidentially Yours Accounting

10210 N. 32nd St. Suite 204, Phoenix, AZ 85028

cyataxeservices@aol.com

www.cyataxes.com

2010 TAX ORGANIZER

The Tax Organizer is designed to help you collect and report information needed to prepare your 2010 income tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

Contact Information

Please help us update our records by filling in the following:

Name(s) _____

Address _____ ZIP _____

Phone Number _____

Email Address _____

- A copy of your 2009 return (**if not in our possession**).
 - Original Form(s) W-2.
 - Schedule(s) K-1 showing income or loss from partnerships, S Corporations or estates or trusts.
 - Copies of other compensation or pension documentation such as Form 1099-MISC/Form 1099-R.
 - Form(s) 1099 or statements reporting dividend and interest income.
 - Brokerage statements showing transaction for stock, bonds, etc.
 - Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
 - Copies of closing statements regarding the sale or purchase of real property.
 - All other information notices you received, or any items you have questions about.
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Sole Proprietor Business of Rental Homes

- Total Business or Rental Income for 2010
- Itemized Business or Rental Expenses including mortgage interest, real estate taxes on rental homes.

Yes No

Did your marital status change in 2010?
If yes, explain _____

Did you have or adopt children in 2010?
If yes, please bring Social Security Numbers and Dates of Birth.

Did you incur adoption expenses during 2010?

Did a lender cancel any of your debt in 2010?

Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2010?

Did you receive any disability payments in 2010?

Did you receive unemployment benefits in 2010?

Did you buy or sell any stocks or bonds in 2010?

If you paid any alimony, enter recipient's SSN: _____ Alimony Paid: _____

If you received alimony, enter amount received _____

Charitable Donations: You must have receipts for both cash (money) donations as well as non cash donations.

Electronic Filing and Direct Deposit of Refund

The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?

If yes, please provide a voided check (not a deposit slip) if your bank account information has changed.

What type of account is this? Checking Savings

If you would like a copy of itemized deduction worksheets, please visit our website www.cyataxes.com

Thank you.