

CYA Confidentially Yours Accounting

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2011 TAX ORGANIZER

The Tax Organizer is designed to help you collect and report information needed to prepare your 2011 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 2010 return (**if not in our possession**).
 - Original Form(s) W-2
 - Schedule(s) K-1 showing income or loss from partnerships, S Corporations, estates or trusts.
 - Copies of 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 2011?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please explain _____		
Did you have or adopt children in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please bring Social Security Numbers and Dates of Birth		
Did you incur adoption expenses during 2011?	<input type="checkbox"/>	<input type="checkbox"/>
Did a lender cancel any of your debt in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy, sell, refinance, foreclose or abandon a principal residence or other Real property in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability payments in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive unemployment benefits in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy or sell stocks or bonds in 2011?	<input type="checkbox"/>	<input type="checkbox"/>
If you paid any alimony, bring recipient's SSN, Alimony Paid _____		
If you received alimony, enter amount received _____		

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

Electronic Filing and Direct Deposit or 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 worksheets, please visit our website www.cyataxes.com

Thank you.