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Your Money Matters to Us.

Dear Client,

Enclosed is your Tax Organizer for 2012. Completing your Organizer helps us prepare your return more efficiently. It will also assist us in getting a complete picture of your tax situation so that we can look for ways to plan to keep your future taxes down.

If your last year's tax figures were available when we prepared your organizer, that information is included on your Organizer in the Prior Year Amount column. This may help you remember the types of income and deductions you reported last year.

The Organizer contains several sections that include common expenses and deductions that many taxpayers overlook. Please review these carefully. Each \$100 of deductible expense you find in your 2012 records may save you up to \$35 in federal and state income taxes.

Enter all relevant information in the designated areas on each page. Feel free to add any notes or questions that might help us find ways to save you money. If you need to include additional information, or ask additional questions, use the back of a page or attach additional pages.

Please provide detailed information if you answer 'Yes' to any of the General or Business and Investment questions.

When you arrive for your appointment, please bring your completed Organizer and any of the following that apply to you:

- Last year's tax return (if not in our possession)
- Original Form[s] W-2
- Schedule[s] K-1 from partnerships, S-corporations, estates or trusts
- Information about contributions to a pension or other retirement plan if this is the first year you received income from the plan
- Form[s] 1099 or statements reporting dividend, interest, retirement or other income
- Form[s] 1098 and copies of real estate tax bills, etc.
- Legal documents pertaining to the close of sale or purchase of real property.

Please call if we can be of any further assistance to you.

Your Tax Appointment is:

Day: _____
Date: _____
Time: _____

General Questions

Please check if "Yes" and provide documentation, if possible.

- | | |
|--------------------------|--|
| <input type="checkbox"/> | 1. Has your marital status changed? |
| <input type="checkbox"/> | 2. Have you been notified by the IRS of changes to a prior year's return, or received any other tax correspondence? |
| <input type="checkbox"/> | 3. Are you being claimed as a dependent by another person? |
| <input type="checkbox"/> | 4. Are there any changes in the dependent information from the prior year? |
| <input type="checkbox"/> | 5. Did you have any children under the age of 19 (or 24 if a full time student) who received more than \$950 in investment income? |
| <input type="checkbox"/> | 6. Do you have dependents who are neither U.S. citizens nor U.S. residents? |
| <input type="checkbox"/> | 7. Did you provide over half of the support for another person (or persons) during the year? |
| <input type="checkbox"/> | 8. Did you purchase or sell a principal residence? |
| <input type="checkbox"/> | 9. Did you receive payments from a pension or profit sharing plan? |
| <input type="checkbox"/> | 10. Did you receive any distributions from an IRA or other qualified plan? |
| <input type="checkbox"/> | 11. Did you receive any disability income? |
| <input type="checkbox"/> | 12. Did you receive any foreign income or pay any foreign taxes? |
| <input type="checkbox"/> | 13. Did you receive interest from a bank account or other financial account based in a foreign country? |
| <input type="checkbox"/> | 14. Were you the grantor of or transferor to a foreign trust? |
| <input type="checkbox"/> | 15. Were either you or your spouse enlisted in the military or National Guard? |
| <input type="checkbox"/> | 16. If you or your spouse are self-employed, are either of you covered under an employer's health plan at another job? |
| <input type="checkbox"/> | 17. Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2011? |
| <input type="checkbox"/> | 18. Did you claim a First-time Homebuyer Credit for a home purchased in 2008? |
| <input type="checkbox"/> | 19. Did you have a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit in 2008, 2009 or 2010? |
| <input type="checkbox"/> | 20. Did you receive proceeds from an installment sale? |
| <input type="checkbox"/> | 21. Did you make a loan at an interest rate below market rate? |
| <input type="checkbox"/> | 22. Did you make gifts of over \$13,000 to an individual? |
| <input type="checkbox"/> | 23. Were there any changes to a prior year's income, deductions, or credits? |
| <input type="checkbox"/> | 24. Did your employer pay premiums on life insurance in excess of \$50,000? |
| <input type="checkbox"/> | 25. Were any payments made on student loans? |
| <input type="checkbox"/> | 26. Did you pay any educational tuition or fees for you or a dependent? |
| <input type="checkbox"/> | 27. Did you purchase a 'clean fuel' or electric hybrid vehicle in 2012? |
| <input type="checkbox"/> | 28. Did you refinance a mortgage or take out a home equity loan? |
| <input type="checkbox"/> | 29. Were any contributions made to a traditional or Roth IRA for 2012? |
| <input type="checkbox"/> | 30. Did you make any contributions to HSA (Health Savings Account) in 2012? |

Business and Investment Questions

- | | |
|--------------------------|--|
| <input type="checkbox"/> | 1. Did you receive stock from a stock bonus plan with your employer? |
| <input type="checkbox"/> | 2. Did you buy or sell any bonds? |
| <input type="checkbox"/> | 3. Did you surrender any U.S. savings bonds? |
| <input type="checkbox"/> | 4. Did you suffer a casualty, theft or condemnation? |
| <input type="checkbox"/> | 5. Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S-corporations? |
| <input type="checkbox"/> | 6. Did you own any investments for which you were not personally "at-risk"? |
| <input type="checkbox"/> | 7. Did you own any interest in a Real Estate Mortgage Investment Conduit (REMIC)? |
| <input type="checkbox"/> | 8. Did you sell any property or equipment on installments? |
| <input type="checkbox"/> | 9. Did you incur any business-related educational expenses? |
| <input type="checkbox"/> | 10. Did you incur any travel and entertainment expenses? |
| <input type="checkbox"/> | 11. Did you purchase any special fuels for non-highway use? |
| <input type="checkbox"/> | 12. Did you make any contributions to a Keogh or a self-employed SEP, SIMPLE or Qualified plan? |

Questions

If any of the following items apply to you or your spouse, please "X" the appropriate box and if possible, include details.

Basic Information

Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	1 Did your marital status change since last year?	
<input type="checkbox"/>	<input type="checkbox"/>	2 Are there any changes in your dependents from last year?	
<input type="checkbox"/>	<input type="checkbox"/>	3 Did you have any children under 19 (or 24 if a full time student) who received more than \$950 in investment income?	
<input type="checkbox"/>	<input type="checkbox"/>	4 Are all your dependents either US residents or citizens?	
<input type="checkbox"/>	<input type="checkbox"/>	5 Did you provide over half of the support for someone you aren't claiming as a dependent?	
<input type="checkbox"/>	<input type="checkbox"/>	6 Are you being claimed (or are eligible to be claimed) as a dependent on anyone else's return?	
<input type="checkbox"/>	<input type="checkbox"/>	7 Were either you or your spouse in the military or National Guard?	
<input type="checkbox"/>	<input type="checkbox"/>	8 Did you purchase or sell your principal residence?	
<input type="checkbox"/>	<input type="checkbox"/>	9 Have you been notified by the IRS of changes to a prior year's return, or received any other tax correspondence?	
<input type="checkbox"/>	<input type="checkbox"/>	10 Were there any changes to a prior year's income, deductions, or credits?	
<input type="checkbox"/>	<input type="checkbox"/>	11 Did you make gifts of more than \$13,000 to any one person?	
<input type="checkbox"/>	<input type="checkbox"/>	12 Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2012?	
<input type="checkbox"/>	<input type="checkbox"/>	13 Did you claim a First-time Homebuyer Credit for a home purchased in 2008?	
<input type="checkbox"/>	<input type="checkbox"/>	14 Did you have a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit in 2008, 2009 or 2010?	
<input type="checkbox"/>	<input type="checkbox"/>	15 Do you want to e-file your return?	
		16 If you are due a refund, how do you want to receive it?	
		<input type="checkbox"/> Check sent to you in the mail <input type="checkbox"/> Western Union® Reloadable MoneyWise™ Prepaid MasterCard®	
		<input type="checkbox"/> Apply to next year's estimates <input type="checkbox"/> Other quick refund via a bank product	
		<input type="checkbox"/> Direct deposit (please provide a voided blank check) Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	
		If you owe taxes, how do you want to pay them?	
		<input type="checkbox"/> Paper check sent with my return <input type="checkbox"/> Credit card	
		<input type="checkbox"/> Direct debit from my bank account (please provide a voided blank check) Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	

Income

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	17 Did you have an interest in or signature authority over a financial account in a foreign country?
<input type="checkbox"/>	<input type="checkbox"/>	18 Were you the grantor of or transferor to a foreign trust?
<input type="checkbox"/>	<input type="checkbox"/>	19 Did you receive income from a foreign source or pay taxes to a foreign government?
<input type="checkbox"/>	<input type="checkbox"/>	20 Did you barter your services for goods or services from someone else?
<input type="checkbox"/>	<input type="checkbox"/>	21 Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account?
<input type="checkbox"/>	<input type="checkbox"/>	22 Did you make a loan to someone at an interest rate below market rate?
<input type="checkbox"/>	<input type="checkbox"/>	23 Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?
<input type="checkbox"/>	<input type="checkbox"/>	24 Did you cash in any U.S. savings bonds?
<input type="checkbox"/>	<input type="checkbox"/>	25 Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?
<input type="checkbox"/>	<input type="checkbox"/>	26 Did you itemize your deductions in a previous year and receive a state or local refund, or a refund of any other deduction you itemized, in 2012? (If yes, attach Form 1099-G)
<input type="checkbox"/>	<input type="checkbox"/>	27 Did you receive disability income?
<input type="checkbox"/>	<input type="checkbox"/>	28 Do you have gambling winnings? (If yes, be sure to include in gambling expenses)
<input type="checkbox"/>	<input type="checkbox"/>	29 Did you receive any unemployment benefits?
<input type="checkbox"/>	<input type="checkbox"/>	30 During 2012, did you receive payments from a Long-Term Care insurance contract?
<input type="checkbox"/>	<input type="checkbox"/>	31 Did you receive employer-provided adoption benefits for a previous year?
<input type="checkbox"/>	<input type="checkbox"/>	32 Did you receive any distributions from a retirement plan? (If Yes, attach all 1099-Rs)
<input type="checkbox"/>	<input type="checkbox"/>	33 Did you "roll over" a retirement plan distribution into another plan?
<input type="checkbox"/>	<input type="checkbox"/>	34 Did you receive Social Security benefits?

