

2012 1040 US Client Information

1

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 Telephone number: (503) 454-0896
 Fax number:
 E-mail address:

Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2012 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table) 1=married filing separate and lived with spouse Year spouse died, if qualifying widow(er) (2010 or 2011)		Filing Status 1 = Single 2 = Married filing joint 3 = Married filing separate 4 = Head of household 5 = Qualifying widow(er)
Taxpayer	First name and initial Last name Title/suffix Social security number Occupation Date of birth (m/d/y) Date of death (m/d/y) 1=blind		
Spouse	First name and initial Last name Title/suffix Social security number Occupation Date of birth (m/d/y) Date of death (m/d/y) 1=blind		
Address	In care of Street address Apartment number City State ZIP code		
Foreign Address	Region Postal code Country		

1

2012

1040

US

Client Information (continued)

1 p2

Please add, change or delete information for 2012.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone		Daytime Phone 1 = Work 2 = Home 3 = Mobile
	Work phone		
	Work extension		
	Daytime phone (table)		
	Mobile phone		
	Pager number		
	Fax number		
	E-mail address		
Spouse Contact Information	Home phone		
	Work phone		
	Work extension		
	Daytime phone (table)		
	Mobile phone		
	Pager number		
	Fax number		
	E-mail address		

1 p2

2012 1040 US Dependents

2

Please add, change or delete information for 2012.

DEPENDENTS

	Dependent	Dependent	
First name			Type of Dependent 1 = Child living w/taxpayer 2 = Child not living w/taxpayer 3 = Dependent other than child 4 = Head of household only, not a dependent 5 = Earned income credit only, not a dependent
Last name			
Title/suffix			
Date of birth (m/d/y)			
Social security number			
Relationship			
Months lived at home			
Type of dependent (see table)			
Earned income credit (see table)			
Claimed by: 1=taxpayer, 2=spouse			
	Dependent	Dependent	Earned Income Credit 1 = When applicable (default) 2 = Student age 19 to 23 3 = Disabled 4 = Force 5 = Suppress NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the U.S. This proof is typically in the form of: 1. School records or statement 2. Landlord or property management statement 3. Health care provider statement 4. Medical records 5. Child care provider records 6. Placement agency statement 7. Social service records or statement 8. Place of worship statement 9. Indian tribe office statement 10. Employer statement
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Social security number			
Relationship			
Months lived at home			
Type of dependent (see table)			
Earned income credit (see table)			
Claimed by: 1=taxpayer, 2=spouse			
	Dependent	Dependent	NOTE: If your child is disabled, please provide one of the following forms of proof of disability: 1. Doctor statement 2. Other health care provider statement 3. Social services agency or program statement
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Social security number			
Relationship			
Months lived at home			
Type of dependent (see table)			
Earned income credit (see table)			
Claimed by: 1=taxpayer, 2=spouse			

2

2012

1040

US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2012, please check the appropriate box and provide additional information if necessary.

YES

NO

PERSONAL INFORMATION☐☐

Did your marital status change during the year?

☐☐

Did your address change during the year?

☐☐

Could you be claimed as a dependent on another person's tax return for 2012?

DEPENDENTS☐☐

Were there any changes in dependents?

☐☐

Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2012?

☐☐

Did you have any children under age 19 or full-time students under age 24 at the end of 2012, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900?

INCOME☐☐

Did you receive unreported tip income of \$20 or more in any month?

☐☐

Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?

☐☐

Did you receive any disability income?

☐☐

Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT☐☐

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

☐☐

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

☐☐

Did you buy or sell any stocks, bonds or other investment property in 2012?

☐☐

Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2013?

☐☐

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

☐☐

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

☐☐

Did you have any debts cancelled or forgiven?

☐☐

Does anyone owe you money which has become uncollectible?

2012

1040

US

Miscellaneous Questions (continued)

If any of the following items pertain to you or your spouse for 2012, please check the appropriate box and provide additional information if necessary.

YES

NO

RETIREMENT PLANS

☐ Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐ Did you transfer or rollover any amount from one retirement plan to another retirement plan?

☐ Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2012?

☐ Did you convert a traditional, SEP, or SIMPLE IRA (or other qualified retirement plan) to a Roth IRA in 2010, and defer the taxable amount of the conversion to tax year 2011 and 2012?

EDUCATION

☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

ITEMIZED DEDUCTIONS

☐ Did you incur a loss because of damaged or stolen property?

☐ Did you work out of town for part of the year?

☐ Did you use your car on the job (other than to and from work)?

ESTIMATED TAXES

☐ Did you apply an overpayment of 2011 taxes to your 2012 estimated tax (instead of being refunded)?

☐ If you have an overpayment of 2012 taxes, do you want the excess applied to your 2013 estimated tax (instead of being refunded)?

☐ Do you expect your 2013 taxable income and withholdings to be different from 2012?

MISCELLANEOUS

☐ Do you want to electronically file your tax return?

☐ Do you want to allocate \$3 to the Presidential Election Campaign Fund?

☐ Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

☐ May the IRS discuss your tax return with your preparer?

☐ Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

2012	1040	US	Miscellaneous Questions (continued)
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If any of the following items pertain to you or your spouse for 2012, please check the appropriate box and provide additional information if necessary.

YES

NO

MISCELLANEOUS (continued)☐☐

Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

☐☐

Was your home rented out or used for business?

☐☐

Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

☐☐

Did you incur moving expenses due to a change of employment?

☐☐

Did you engage the services of any household employees?

☐☐

Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

☐☐

Did you or your spouse make any gifts to an individual that total more than \$13,000, or any gifts to a trust?

2012

1040

US

Direct Deposit & Estimates (Form 1040 ES)

3, 6

Please enter all pertinent 2012 information.

DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)

1=direct deposit of federal tax refund into bank account

1=electronic payment of balance due

1=electronic payment of estimated tax

BANK INFORMATION

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

2012 ESTIMATED TAX / 1040-ES (6)**Federal**

Overpayment applied from 2011

1st quarter payment

2nd quarter payment

3rd quarter payment

4th quarter payment

Additional Estimated
Tax Payments

Paid with extension

Amount Paid

Date Paid

TS

2011
Voucher Amount**State**

Overpayment applied from 2011

1st quarter payment

2nd quarter payment

3rd quarter payment

4th quarter payment

Additional Estimated
Tax Payments

Paid with extension

Amount Paid

Date Paid

TS

2011
Voucher Amount

1

Type of Account

- 1 = Savings
2 = Checking

2

Type of Investment

- 1 = Checking or savings (default)
2 = Taxpayer's IRA (next year limits)
3 = Spouse's IRA (next year limits)
4 = Health savings account (HSA)
5 = Archer MSA
6 = Coverdell savings account (ESA)
7 = Other
8 = Taxpayer's IRA (current year limits)
9 = Spouse's IRA (current year limits)
10 = Series I treasury bonds

3, 6

2012 1040 US Direct Deposit & Estimates (Form 1040 ES) (cont.)

7.1

Please enter all pertinent 2012 information.

APPLICATION OF 2012 OVERPAYMENT (7.1)If you have an overpayment of 2012 taxes, do you want the excess refunded? ☐ or applied to 2013 estimate? ☐Other (please explain): _____

_____**2013 ESTIMATED TAX INFORMATION**Do you expect your 2013 taxable income to be different from 2012? Yes ☐ No ☐If "yes" explain any differences in income, deductions, dependents, etc.: _____

_____Do you expect your 2013 withholding to be different from 2012? Yes ☐ No ☐If "yes" explain any differences: _____

7.1

2012	1040	US	Wages, Pensions, Gambling Winnings	10, 13.1, 13.2
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Please enter all pertinent 2012 amounts & attach all W-2, W-2G and 1099-R forms.
Last year's amounts are provided for your reference.

WAGES, SALARIES, TIPS (10)

No.	Name of Employer (Box c)	1=retirement plan (Box 13) 1=spouse	Wages, Tips, Other Compensation (Box 1)	Tax Withheld					2011 Wages
				Federal (Box 2)	Social Security (Box 4)	Medicare (Box 6)	State (Box 17)	Local (Box 19)	

PENSIONS, IRA DISTRIBUTIONS (13.1)

No.	Name of Payer	Distribution code #2			Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld		Value of all IRAs at 12/31/12	2011 Distribution
		Distribution code #1								
		1=IRA/SEP/SIMPLE								
		1=spouse								

GAMBLING WINNINGS (W-2G) (13.2)

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld		2011 Winnings
				Federal (Box 2)	State (Box 14)	

GAMBLING LOSSES & WINNINGS (NON W-2G) (13.2)

Total gambling losses.....
Winnings not reported on Form W-2G.....

2012 Amount	T	2011 Amount

10, 13.1, 13.2

INTEREST INCOME (11)

[illegible][illegible]

2012 1040 US Miscellaneous Income

14.1

Please enter all pertinent 2012 amounts and attach all 1099-MISC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.

MISCELLANEOUS INCOME

	2012 Amount		2011 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Social security benefits (SSA-1099, box 5)				
Medicare premiums paid (SSA-1099)				
Tier 1 RR retirement benefits (RRB-1099, box 5)				
1-lump-sum election for SS benefits				
Alimony received				
Taxable scholarships and fellowships				
Jury duty pay				
Household employee income not on W-2				
Excess minister's allowance				
Alaska permanent fund dividends				
Income from rental of personal property				
Income subject to S/E tax:				

Other income (1099-MISC, box 3)				

TAX WITHHELD (not entered elsewhere)

Federal income tax withheld				
State income tax withheld				
Local income tax withheld				

14.1

2012

1040

US

State & Local Tax Refunds / Unemployment Compensation

14.2

Please add, change or delete 2012 information as appropriate.
Be sure to attach all 1099-G forms.

STATE AND LOCAL TAX REFUNDS / UNEMPLOYMENT COMPENSATION (Form 1099-G)

2012 1099-G Amount

No. <input type="text"/>	Name of payer		
	1=spouse		
	Unemployment compensation:		
	Total received (Box 1)		
	2012 Overpayment repaid		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)		
	1=city or local income tax refund		
	Tax year for box 2 if not 2011 (Box 3)		
	Federal income tax withheld (Box 4)		
	ATAA/RTAA payments (Box 5)		
	Taxable grants:		
	Federal taxable amount (Box 6)		
	State taxable amount, if different		
	Farm amounts:		
Agriculture payments (Box 7)			
1=agriculture payments are from conservation reserve program			
Market gain (Box 9)			
Number of farm			
1=box 2 is trade or business income (Box 8)			
State income tax withheld (Box 11)			

No. <input type="text"/>	Name of payer		
	1=spouse		
	Unemployment compensation:		
	Total received (Box 1)		
	2012 Overpayment repaid		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)		
	1=city or local income tax refund		
	Tax year for box 2 if not 2011 (Box 3)		
	Federal income tax withheld (Box 4)		
	ATAA/RTAA payments (Box 5)		
	Taxable grants:		
	Federal taxable amount (Box 6)		
	State taxable amount, if different		
	Farm amounts:		
Agriculture payments (Box 7)			
1=agriculture payments are from conservation reserve program			
Market gain (Box 9)			
Number of farm			
1=box 2 is trade or business income (Box 8)			
State income tax withheld (Box 11)			

2012

1040

US

Business Income (Schedule C)

No.

16

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Principal business/profession

Principal business code

Business name, if different from Form 1040

Business address, if different from Form 1040

City, if different from Form 1040

State, if different from Form 1040

ZIP code, if different from Form 1040

Employer identification number

Other accounting method

Accounting method: 1=cash, 2=accrual

Inventory method: 1=cost, 2=lower cost/market, 3=other

1=change of inventory method

1=spouse, 2=joint

1=first Schedule C filed for this business

If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no

1=not subject to self-employment tax

1=did not "materially participate"

1=personal services is not a material income producing factor

1=investment

1=minister's Schedule C

1=single member limited liability company

INCOME

Gross receipts or sales (Form 1099-MISC, box 7)

Returns and allowances

Other income:

2012 Amount

2011 Amount

COST OF GOODS SOLD

Inventory at beginning of the year

Purchases

Cost of items for personal use

Cost of labor

Materials and supplies

Other costs:

Inventory at end of the year

16

2012

1040

US

Business Income (Schedule C) (cont.)

No.

16 p2

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

EXPENSES

2012 Amount

2011 Amount

Accounting

Advertising

Answering service

Bad debts from sales or service

Bank charges

Car and truck expenses (not entered elsewhere)

Commissions

Contract labor

Delivery and freight

Dues and subscriptions

Employee benefit programs

Insurance (other than health)

Mortgage interest (paid to banks, etc.)

Other interest (not entered elsewhere)

Janitorial

Laundry and cleaning

Legal and professional

Miscellaneous

Office expense

Outside services

Parking and tolls

Pension and profit sharing plans - contributions

Pension and profit sharing plans - admin. and education costs

Postage

Printing

Rent - vehicles, machinery, & equipment (not entered elsewhere)

Rent - other

Repairs

Security

Supplies

Taxes - real estate

Taxes - payroll

Taxes - sales tax included in gross receipts

Taxes - other (not entered elsewhere)

Telephone

Tools

Travel

Total meals and entertainment in full (50%)

Department of Transportation meals in full (80%)

Uniforms

Utilities

Wages

Other expenses:

.....

.....

.....

.....

.....

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

16 p2

Series: 52 Capital Gains & Losses (Schedule D)

2012

1040

US

Rental & Royalty Income (Schedule E)

No.

18

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

RENTAL & ROYALTY INCOME (Schedule E)

2012 Amount

2011 Amount

Description of property.....

Street address.....

City.....

State.....

ZIP code.....

Type of property (see table).....

Other type of property.....

Number of days rented.....

GENERAL INFORMATION

Percentage of ownership if not 100% (.xxxx).....

Percentage of tenant occupancy if not 100% (.xxxx).....

1=spouse, 2=joint.....

1=qualified joint venture.....

If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no.....

1=nonpassive activity, 2=passive royalty.....

1=did not actively participate.....

1=real estate professional.....

1=rental other than real estate.....

1=investment.....

1=single member limited liability company.....

Type of Property

- 1 = Single Family Residence
- 2 = Multi-Family Residence
- 3 = Vacation/Short-Term Rental
- 4 = Commercial
- 5 = Land
- 6 = Royalties
- 7 = Self-Rental

INCOME

2012 Amount

2011 Amount

Rents or royalties received.....

DIRECT EXPENSES

NOTE: Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

Advertising.....

Association dues.....

Auto and travel (not entered elsewhere).....

Cleaning and maintenance.....

Commissions.....

Gardening.....

Insurance.....

Legal and professional fees.....

Licenses and permits.....

Management fees.....

Miscellaneous.....

Mortgage interest (paid to banks, etc.).....

Qualified mortgage insurance premiums.....

Excess mortgage interest.....

Other interest (not entered elsewhere).....

Painting and decorating.....

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

2012

1040

US

Rental & Royalty Income (Sch. E) (cont.)

No.

18 p2

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.

DIRECT EXPENSES (continued)

Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

	2012 Amount	2011 Amount
Pest control		
Plumbing and electrical		
Repairs		
Supplies		
Taxes - real estate		
Taxes - other (not entered elsewhere)		
Telephone		
Utilities		
Wages and salaries		
Other:		
.....		
.....		
.....		

OIL AND GAS

Production type (preparer use only)		
Cost depletion		
Percentage depletion rate or amount		
State cost depletion, if different (-1 if none)		
State % depletion rate or amount, if different (-1 if none)		

VACATION HOME

Number of days personal use		
Number of days owned (if optional method elected)		

INDIRECT EXPENSES

NOTE: Indirect expenses are related to operating or maintaining the dwelling unit. These include repairs, insurance, and utilities.

Advertising		
Association dues		
Auto and travel (not entered elsewhere)		
Cleaning and maintenance		
Commissions		
Gardening		
Insurance		
Legal and professional fees		
Licenses and permits		
Management fees		
Miscellaneous		
Mortgage interest (paid to banks, etc.)		
Qualified mortgage insurance premiums		
Excess mortgage interest		
Other interest (not entered elsewhere)		
Painting and decorating		

18 p2

2012

1040

US

Rental & Royalty Income (Sch. E) (cont.)

No.

18 p3

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.

INDIRECT EXPENSES (continued)

NOTE: Indirect expenses are related to operating or maintaining the dwelling unit.
These include repairs, insurance, and utilities.

	2012 Amount	2011 Amount
Pest control		
Plumbing and electrical		
Repairs		
Supplies		
Taxes - real estate		
Taxes - other (not entered elsewhere)		
Telephone		
Utilities		
Wages and salaries		
Other:		
.....		
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.....		

18 p3

2012

1040

US

Partnership and S corporation Information

20.1,20.2

Please add, change or delete 2012 information as appropriate. Be sure to attach all Schedule K-1s.

PARTNERSHIP INFORMATION (20.1)

No.	Name of Partnership	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in Partnership

S CORPORATION INFORMATION (20.2)

No.	Name of S corporation	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in S corporation

20.1,20.2

2012 1040 US Vehicle Expenses

No.

22 p3

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Description of vehicle:

I=no evidence to support your deduction

I=no written evidence to support your deduction

I=vehicle is available for off-duty personal use.

I=no other vehicle is available for personal use

I=vehicle used primarily by more than 5% owner

Number of months your job required a vehicle (if not 12 months)

2012 Amount

2011 Amount

AUTOMOBILE MILEAGE

Total mileage (for the tax year)

Business mileage

Commuting mileage (for the tax year)

Average daily round-trip commute

ACTUAL EXPENSES

Parking fees and tolls (business portion only)

Gasoline, lube, oil

Repairs

Tires

Insurance

Miscellaneous

Auto license (other than personal property taxes)

Personal property taxes (based on car's value)

Interest (car loan) (for Schedule C, E & F)

Vehicle rent or lease payments

Inclusion amount (enter as positive)

Value of employer-provided vehicle on Form W-2 (2106)

2012 1040 US Itemized Deductions

25

Please enter all pertinent 2012 amounts and attach all 1098 forms.
Last year's amounts are provided for your reference.

MEDICAL AND DENTAL EXPENSES

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

	2012 Amount	TS	2011 Amount
Prescription medicines and drugs			
Doctors, dentists and nurses			
Hospitals and nursing homes			
Insurance premiums not entered elsewhere (incl. LT care & amts. paid w/pre-tax dollars)			
Long-term care premiums - taxpayer			
Long-term care premiums - spouse			
Insurance reimbursement (enter as a positive number)			
Lodging and transportation:			
Out-of-pocket expenses			
Medical miles driven			
Other medical and dental expenses:			
.....			
.....			
.....			

TAXES PAID (State and local withholding and 2012 estimates are automatic.)

State income taxes - 1/12 payment on 2011 state estimate			
State income taxes - paid with 2011 state return extension			
State income taxes - paid with 2011 state return			
State income taxes - paid for prior years and/or to other state			
City/local income taxes - 1/12 payment on 2011 city/local estimate			
City/local income taxes - paid with 2011 city/local extension			
City/local income taxes - paid with 2011 city/local return			

SALES AND USE TAXES PAID

State and local sales taxes (except autos and special items)			
Use taxes paid on 2012 purchases			
Use taxes paid with 2011 state return			
Sales tax on autos not included above			
Sales tax on boats, aircraft, other special items			

OTHER TAXES PAID

Real estate taxes - principal residence:

.....			
.....			
.....			

Real estate taxes - property held for investment

Personal property taxes (including auto fees in some states. Provide a copy of tax notice)

Foreign income taxes

Other taxes:

.....			
.....			
.....			

25

2012

1040

US

Itemized Deductions (continued)

25 p2

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

INTEREST PAID

Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:

2012 Amount

TS

2011 Amount

Home mortgage interest not reported on Form 1098:

Payee's name

Payee's SSN or FEIN

Payee's street address

Payee's city

Payee's state

Payee's ZIP code

Amount paid

Points not reported on Form 1098:

Mortgage insurance premiums on post 12/31/06 contracts (Box 4)

Investment interest (interest on margin accounts):

Passive interest

Certain home mortgage interest included above (6251)

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Churches, schools, hospitals, and other charitable organizations (50% limitation):

Contributions by cash or check:

Volunteer expenses (out-of-pocket)

Number of charitable miles

Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:

Volunteer expenses (out-of-pocket)

Number of charitable miles

25 p2

2012 1040 US Itemized Deductions (continued)

25 p3

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

NONCASH CONTRIBUTIONS

NOTE: Use Sheet 25 if total noncash contributions are over \$500. No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

50% limitation (see above):

2012 Amount

TS

2011 Amount

30% limitation (see above):

30% capital gain property (gifts of capital gain property to 50% limit orgs.):

20% capital gain property (gifts of capital gain property to non-50% limit orgs.):

MISCELLANEOUS DEDUCTIONS (subject to 2% AGI limit)

Union and professional dues

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Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):

Investment expense:

Tax return preparation fee

Safe deposit box rental

Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):

25 p3

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

OTHER MISCELLANEOUS DEDUCTIONS

Estate tax, section 691(c)

Other miscellaneous deductions:

2012 Amount

T5

2011 Amount

Itemized Deductions (continued)

2012	1040	US	Noncash Contributions (Form 8283)
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26

If your total noncash contributions are in excess of \$500 in 2012, please complete the information below for each donee using the following guidelines:

- * If you contributed a motor vehicle, boat, or airplane with a claimed value of more than \$500, attach Form 1098-C or other written acknowledgement received from the donee organization.
- * A deduction for contributions of clothing or other household items that are not in good used condition or better is not allowed. In addition, a deduction for any item with minimal monetary value may be denied. However, these rules do not apply to any contribution of a single item for which a deduction of more than \$500 is claimed, if a qualified appraisal for the donated property is provided.

DONATED PROPERTY INFORMATION

No. <input style="width: 40px;" type="text"/>	Vehicle	Name of charitable organization (donee)	
		Street address	
		City	
		State	
		ZIP code	
		1=spouse, 2=joint	
		Property description (other than vehicle)	
		Identification number (VIN)	
		Year (yyyy)	
		Make and model	
		Condition and mileage	
		Date of contribution (m/d/y)	
		Date acquired by donor (m/y)	
		How acquired by donor (Table 1 or describe)	
		Donor's cost or basis	
Fair market value			
Method used to determine FMV (Table 2 or describe)			

No. <input style="width: 40px;" type="text"/>	Vehicle	Name of charitable organization (donee)	
		Street address	
		City	
		State	
		ZIP code	
		1=spouse, 2=joint	
		Property description (other than vehicle)	
		Identification number (VIN)	
		Year (yyyy)	
		Make and model	
		Condition and mileage	
		Date of contribution (m/d/y)	
		Date acquired by donor (m/y)	
		How acquired by donor (Table 1 or describe)	
		Donor's cost or basis	
Fair market value			
Method used to determine FMV (Table 2 or describe)			

1 How Property was Acquired <div style="display: flex; justify-content: space-between;"> <div>1 = Purchase 2 = Gift</div> <div>3 = Inheritance 4 = Exchange</div> </div>	2 Method Used to Determine FMV <div style="display: flex; justify-content: space-between;"> <div>1 = Appraisal 2 = Thrift shop value</div> <div>3 = Catalog 4 = Comparable sales</div> </div> <p style="text-align: center; font-size: small;">For other methods, see IRS Pub. 561.</p>
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26

2012

1040

US

Health Savings Accounts (8889)

32.1

Please enter all pertinent 2012 amounts & attach all 1099-SA forms.
Last year's amounts are provided for your reference.

HSA CONTRIBUTIONS

NOTE: Contributions to an HSA are only eligible to persons covered under a high deductible health plan. For tax year 2012, a high deductible health plan is one with an annual deductible that is not less than \$1,200 for self-only coverage or \$2,400 for family coverage, and the annual out-of-pocket expenses (deductibles, co-payments, and other amounts, but not premiums) do not exceed \$6,050 for self-only coverage or \$12,100 for family coverage.

	2012 Amount		2011 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
1= self-only coverage, 2= family coverage				
HSA contributions you made or expect to make, except rollovers, employer contributions, and contributions made to an employee account through a cafeteria plan (1=maximum)				
Contributions included above that were made after you became eligible for Medicare				
Contributions made to date				

HSA DISTRIBUTIONS

Total HSA distribution received (1099-SA, box 1)				
Distributions included above that were rolled over to another HSA				
Total unreimbursed qualified medical expenses				

32.1

2012

1040

US

Education Credits / Tuition Deduction

No.

38

Please complete the information below if you paid qualified education expenses in 2012 for you, your spouse, or your dependents enrolled in an accredited postsecondary institution. Last year's amounts are provided for your reference.

STUDENT INFORMATION

1=taxpayer, 2=spouse.

First name

Last name

Social security number

Number of years hope credit claimed

Number of years American opportunity credit claimed

1=student was NOT enrolled at least half-time for at least one academic period that began in 2012 at an eligible institution in a qualified program

1=student completed first four years of post-secondary education before 2012

1=student was convicted, before the end of 2012, of a felony for possession or distribution of a controlled substance

EDUCATIONAL INSTITUTION ATTENDED (#1)

Name

Street address

City

State

ZIP code

1=2012 Form 1098-T received

1=2012 Form 1098-T received with Box 2 & 7 completed

Federal ID number from Form 1089-T

EDUCATIONAL INSTITUTION ATTENDED (#2)

Name

Street address

City

State

ZIP code

1=2012 Form 1098-T received

1=2012 Form 1098-T received with Box 2 & 7 completed

Federal ID number from Form 1089-T

QUALIFIED EDUCATION EXPENSES

2012 Amount

2011 Amount

Qualified tuition & fees paid in 2012 (net of refund or assistance, & not entered elsewhere)

Books & supplies required to be purchased from institution

Books & supplies not entered above

Amount of prior year refund or assistance *

* Refund of qualified expenses and tax-free educational assistance received after you file your return for the year in which the expenses were paid.