2012	1040	US	Client Information	1

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San Rafael, CA 94901
Telephone number: (415) 453-0207
Fax number: 415-453-0406
E-mail address: smr@smr-cpa.com

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)	
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	

Filing Status

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying widow(er)

2012	1040	US	Client Information (continued)	1 p2

Please add, change or delete information for 2012.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone	
	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	

Daytime Phone

1 = Work
2 = Home
3 = Mobile

2012 | **1040** | **US** | **Dependents** | **2**

Please add, change or delete information for 2012.

DEPENDENTS

	Dependent	Dependent
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
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
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
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		

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

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

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

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.

PERSONAL INFORMATION

YES	NO	
☐	☐	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)

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	18	
1=electronic payment of balance due	34	
1=electronic payment of estimated tax	36	

BANK INFORMATION

Name of Bank		Percent to Deposit (xx.xx)		Routing Number		Account Number		Type of Account (Table 1)		Type of Invest. (Table 2)	
19		24		20		21		22		71	
44		45		47		48		49		72	
50		51		67		68		69		73	

2012 ESTIMATED TAX / 1040-ES (6)

Federal

	Amount Paid		Date Paid		TS	2011 Voucher Amount	
Overpayment applied from 2011	1						
1st quarter payment	2		3			13	
2nd quarter payment	4		5			14	
3rd quarter payment	6		7			15	
4th quarter payment	8		9			16	
Additional Estimated Tax Payments	38		39				
	40		41				
	42		43				
	44		45				
Paid with extension	10		11			802	

State

	Amount Paid		Date Paid		TS	2011 Voucher Amount	
Overpayment applied from 2011	101						
1st quarter payment	102		103			113	
2nd quarter payment	104		105			114	
3rd quarter payment	106		107			115	
4th quarter payment	108		109			116	
Additional Estimated Tax Payments	138		139				
	140		141				
	142		143				
	144		145				
Paid with extension	110		111			804	

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

(t=taxpayer, s=spouse, blank=joint)

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: ______

2012	1040	US	Wages, Pensions, Gambling Winnings	10, 13.1, 13.2

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=spouse	1=retirement plan (Box 13)	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)	
	800	1	2	3	4	6	8	14	18	

PENSIONS, IRA DISTRIBUTIONS (13.1)

No.	Name of Payer	1=spouse	1=IRA/SEP/SIMPLE	Distribution code #1	Distribution code #2	Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld		Value of all IRAs at 12/31/12	2011 Distribution
								Federal (Box 4)	State (Box 12)		
	800	1	2	810	196	3	4	6	9	34	

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)	
	800	1	3	6	9	

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

		2012 Amount	TS	2011 Amount
Total gambling losses	12			
Winnings not reported on Form W-2G	10			

	10, 13.1, 13.2

(T=taxpayer, S=spouse, Blank=joint)

2012	**1040**	**US**	**Interest & Dividend Income**	**11, 12**

Please enter all pertinent 2012 amounts & attach all 1099-INT, 1099-OID and 1099-DIV forms.
Last year's amounts are provided for your reference.

INTEREST INCOME (11)

No.	Name of Payer (also enter SSN & address for seller-financed mortgage)	1=taxpayer 2=spouse	Interest Income			Tax-Exempt Interest		Early Withdrawal Penalty (Box 2)	2011 Interest
			Banks, S&Ls, C/Us, etc. (Box 1)	Seller-Financed Mtg. (Box 1)	U.S. Bonds, T-Bills (Box 3)	Total Municipal Bonds	In-state Municipal Bonds		
	800 (801, 813, 802, 803)	1	2	3	4	19	5	18	

DIVIDEND INCOME (12)

No.	Name of Payer	1=tp 2=sp	Dividend Income				Tax-Exempt Interest		Foreign Tax Paid (Box 6)	2011 Dividends
			Total Ordinary Dividends (Box 1a)	Qualified Dividends (Box 1b)	Total Capital Gain Distrib. (Box 2a)	U.S. Bonds (% or amt.)	Total Municipal Bonds	In-state Muni-bonds (% or amt.)		
	800	1	2	30	3	502	18	503	16	

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)	2		52			
Medicare premiums paid (SSA-1099)	13		63			
Tier 1 RR retirement benefits (RRB-1099, box 5)	3		53			
1=lump-sum election for SS benefits	12		62			
Alimony received	5		55			
Taxable scholarships and fellowships	8		58			
Jury duty pay	28		78			
Household employee income not on W-2	9		59			
Excess minister's allowance	24		74			
Alaska permanent fund dividends	21		71			
Income from rental of personal property	23		73			
Income subject to S/E tax:						
	10		60			
	10		60			
	10		60			
	10		60			
	10		60			
	10		60			
Other income (1099-MISC, box 3)						
	11		61			
	11		61			
	11		61			
	11		61			
	11		61			
	11		61			

TAX WITHHELD (not entered elsewhere)

Federal income tax withheld	14		64			
State income tax withheld	15		65			
Local income tax withheld	16		66			

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
	Name of payer	800	
	1=spouse	1	
	Unemployment compensation:		
	Total received (Box 1)	2	
	2012 Overpayment repaid	3	
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)	4	
	1=city or local income tax refund	9	
	Tax year for box 2 if not 2011 (Box 3)	5	
	Federal income tax withheld (Box 4)	6	
No. ☐	ATAA/RTAA payments (Box 5)	25	
	Taxable grants:		
	Federal taxable amount (Box 6)	12	
	State taxable amount, if different	17	
	Farm amounts:		
	Agriculture payments (Box 7)	13	
	1=agriculture payments are from conservation reserve program	24	
	Market gain (Box 9)	26	
	Number of farm	15	
	1=box 2 is trade or business income (Box 8)	14	
	State income tax withheld (Box 11)	11	

	Name of payer	800	
	1=spouse	1	
	Unemployment compensation:		
	Total received (Box 1)	2	
	2012 Overpayment repaid	3	
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)	4	
	1=city or local income tax refund	9	
	Tax year for box 2 if not 2011 (Box 3)	5	
	Federal income tax withheld (Box 4)	6	
No. ☐	ATAA/RTAA payments (Box 5)	25	
	Taxable grants:		
	Federal taxable amount (Box 6)	12	
	State taxable amount, if different	17	
	Farm amounts:		
	Agriculture payments (Box 7)	13	
	1=agriculture payments are from conservation reserve program	24	
	Market gain (Box 9)	26	
	Number of farm	15	
	1=box 2 is trade or business income (Box 8)	14	
	State income tax withheld (Box 11)	11	

2012	**1040**	**US**	**Education Distributions (ESA's and QTP's)**	**14.3**

Please enter all pertinent 2012 amounts and attach all 1099-Q forms.
Enter qualified education expenses below that are not entered elsewhere.
Last year's amounts are provided for your reference.

ESA'S AND QTP'S (Form 1099-Q)

			2012 Amount	2011 Amount
	Name of payer	800		
	1=spouse	1		
	Qualified expenses:			
	Higher education (net of nontaxable benefits)	143		
	Elementary & secondary education (net of nontaxable benefits)	307		
	Form 1099-Q:			
	Gross distributions (Box 1)	301		
No.	Earnings (Box 2)	302		
	Basis (Box 3)	303		
	Rollover: 1=nontaxable, 2=taxable (Box 4)	304		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5)	2		
	ESA's only:			
	2012 contributions to this ESA	142		
	Value of this account at 12/31/12 (plus outstanding rollovers)	144		
	Basis in this ESA as of 12/31/11	165		

	Name of payer	800		
	1=spouse	1		
	Qualified expenses:			
	Higher education (net of nontaxable benefits)	143		
	Elementary & secondary education (net of nontaxable benefits)	307		
	Form 1099-Q:			
	Gross distributions (Box 1)	301		
No.	Earnings (Box 2)	302		
	Basis (Box 3)	303		
	Rollover: 1=nontaxable, 2=taxable (Box 4)	304		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5)	2		
	ESA's only:			
	2012 contributions to this ESA	142		
	Value of this account at 12/31/12 (plus outstanding rollovers)	144		
	Basis in this ESA as of 12/31/11	165		

	Name of payer	800		
	1=spouse	1		
	Qualified expenses:			
	Higher education (net of nontaxable benefits)	143		
	Elementary & secondary education (net of nontaxable benefits)	307		
	Form 1099-Q:			
	Gross distributions (Box 1)	301		
No.	Earnings (Box 2)	302		
	Basis (Box 3)	303		
	Rollover: 1=nontaxable, 2=taxable (Box 4)	304		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5)	2		
	ESA's only:			
	2012 contributions to this ESA	142		
	Value of this account at 12/31/12 (plus outstanding rollovers)	144		
	Basis in this ESA as of 12/31/11	165		

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	800	
Principal business code	801	
Business name, if different from Form 1040	802	
Business address, if different from Form 1040	803	
City, if different from Form 1040	804	
State, if different from Form 1040	828	
ZIP code, if different from Form 1040	829	
Employer identification number	805	
Other accounting method	806	

Accounting method: 1=cash, 2=accrual	7	
Inventory method: 1=cost, 2=lower cost/market, 3=other	6	
1=change of inventory method	8	
1=spouse, 2=joint	10	
1=first Schedule C filed for this business	44	
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no	112	
1=not subject to self-employment tax	39	
1=did not "materially participate"	22	
1=personal services is not a material income producing factor	220	
1=investment	37	
1=minister's Schedule C	302	
1=single member limited liability company	418	

INCOME

		2012 Amount	2011 Amount
Gross receipts or sales (Form 1099-MISC, box 7)	51		
Returns and allowances	52		
Other income:			
	54		
	54		
	54		
	54		
	54		
	54		
	54		
	54		

COST OF GOODS SOLD

Inventory at beginning of the year	14		
Purchases	15		
Cost of items for personal use	16		
Cost of labor	17		
Materials and supplies	18		
Other costs:			
	19		
	19		
	19		
	19		
	19		
Inventory at end of the year	20		

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	201		
Advertising	56		
Answering service	202		
Bad debts from sales or service	57		
Bank charges	203		
Car and truck expenses (not entered elsewhere)	59		
Commissions	60		
Contract labor	87		
Delivery and freight	204		
Dues and subscriptions	205		
Employee benefit programs	64		
Insurance (other than health)	66		
Mortgage interest (paid to banks, etc.)	12		
Other interest (not entered elsewhere)	67		
Janitorial	206		
Laundry and cleaning	207		
Legal and professional	69		
Miscellaneous	208		
Office expense	70		
Outside services	209		
Parking and tolls	210		
Pension and profit sharing plans - contributions	71		
Pension and profit sharing plans - admin. and education costs	53		
Postage	211		
Printing	212		
Rent - vehicles, machinery, & equipment (not entered elsewhere)	58		
Rent - other	72		
Repairs	73		
Security	213		
Supplies	74		
Taxes - real estate	45		
Taxes - payroll	41		
Taxes - sales tax included in gross receipts	43		
Taxes - other (not entered elsewhere)	75		
Telephone	214		
Tools	215		
Travel	76		
Total meals and entertainment in full (50%)	81		
Department of Transportation meals in full (80%)	86		
Uniforms	216		
Utilities	77		
Wages	78		

Other expenses:

	90		
	90		
	90		
	90		
	90		
	90		

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

2012	**1040**	**US**	**Capital Gains & Losses (Schedule D)**	**17**

If you sold any stocks, bonds, or other investment property in 2012, please list the pertinent information for each sale below or provide a spreadsheet file with this information.
Be sure to attach all 1099-B forms and brokerage statements.

No.	Quantity	Description of Property (Box 8)	Date Acquired (Box 1b)	Date Sold (Box 1a)	Sales Price (gross or net) (Box 2)	Cost or Basis (Box 3)	Blank=basis rep. to IRS, 1=nonrec. security (Box 6)	Expenses of Sale (if gross sales price entered)	Federal Income Tax Withheld (Box 4)
	847	800	25	26	27	29	541	28	168

2012	**1040**	**US**	**Installment Sales (Form 6252)**	**17 p2**

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

PRIOR YEAR INSTALLMENT SALE

			2012 Amount	**2011 Amount**
No. ☐	Description of property	800		
	Date acquired (m/d/y)	25		
	Date sold (m/d/y)	26		
	Gross profit ratio (.xxxx)	500		
	Current year principal payments (-1 if none)	36		

No. ☐	Description of property	800		
	Date acquired (m/d/y)	25		
	Date sold (m/d/y)	26		
	Gross profit ratio (.xxxx)	500		
	Current year principal payments (-1 if none)	36		

No. ☐	Description of property	800		
	Date acquired (m/d/y)	25		
	Date sold (m/d/y)	26		
	Gross profit ratio (.xxxx)	500		
	Current year principal payments (-1 if none)	36		

No. ☐	Description of property	800		
	Date acquired (m/d/y)	25		
	Date sold (m/d/y)	26		
	Gross profit ratio (.xxxx)	500		
	Current year principal payments (-1 if none)	36		

No. ☐	Description of property	800		
	Date acquired (m/d/y)	25		
	Date sold (m/d/y)	26		
	Gross profit ratio (.xxxx)	500		
	Current year principal payments (-1 if none)	36		

No. ☐	Description of property	800		
	Date acquired (m/d/y)	25		
	Date sold (m/d/y)	26		
	Gross profit ratio (.xxxx)	500		
	Current year principal payments (-1 if none)	36		

No. ☐	Description of property	800		
	Date acquired (m/d/y)	25		
	Date sold (m/d/y)	26		
	Gross profit ratio (.xxxx)	500		
	Current year principal payments (-1 if none)	36		

2012	**1040**	**US**	**Sale of Home & Moving Expenses**	**17, 27**

If you sold your home or moved in 2012, please complete the information below. For the sale of home, please provide Form 1099-S and closing statements from the purchase and sale of your home.

SALE OF HOME (17)

Description of property (Box 3)	800	
Date acquired (m/d/y)	25	
Date sold (m/d/y) (Box 1)	26	
Sales price (Box 2)	27	
1=sale of home	46	
1=owned and used property as main home for at least 2 of 5 years before sale	145	
1=first-time homebuyer credit was previously taken on this home	366	
1=business use in year of sale	167	
Number of days after December 31, 2008 that home was not used as principal residence	367	

Adjusted Basis

Original cost		
Improvements:		
Adjusted basis	29	

Expenses of Sale (Commissions, advertising fees, legal fees, and loan charges paid by the seller)

Total expenses of sale	28	

Reduced Exclusion

Please complete the following information if due to a change in health, place of employment, or unforeseen circumstances you either: **a)** Did not meet the ownership and use tests *, or **b)** Excluded gain on the sale of another home after May 6, 1997.

If excl. gain from another home after May 6, 1997 & within 2 yrs. of current sale, enter date of sale (m/d/y)	152	
1=sale due to change in health, employment or unforeseen circumstances	161	
Days used as main home - taxpayer	148	
Days used as main home - spouse	149	
Days property owned - taxpayer	150	
Days property owned - spouse	151	

MOVING EXPENSES (27) (If you moved because of a change in the location of your job)

1=spouse, 2=joint	1	
1=armed forces move due to permanent change of station	14	
Miles from old home to new work place	2	
Miles from old home to old work place	3	
Expenses for transportation and storage of household goods and personal effects	4	
Lodging and travel (excluding meals):		
Lodging and travel (excluding automobile)	5	
Parking fees and tolls	15	
Gas and oil	16	
Miles driven to new home	17	

(* owned and used property as main home for at least 2 of 5 years before sale)

17, 27

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	800		
Street address	801		
City	820		
State	821		
ZIP code	822		
Type of property (see table)	802		
Other type of property	803		
Number of days rented	34		

GENERAL INFORMATION

Percentage of ownership if not 100% (.xxxx)	500	
Percentage of tenant occupancy if not 100% (.xxxx)	503	
1=spouse, 2=joint	33	
1=qualified joint venture	108	
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no	112	
1=nonpassive activity, 2=passive royalty	39	
1=did not actively participate	38	
1=real estate professional	32	
1=rental other than real estate	71	
1=investment	48	
1=single member limited liability company	418	

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	110		

DIRECT EXPENSES

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

		2012 Amount	2011 Amount
Advertising	4		
Association dues	16		
Auto and travel (not entered elsewhere)	5		
Cleaning and maintenance	6		
Commissions	7		
Gardening	18		
Insurance	8		
Legal and professional fees	10		
Licenses and permits	23		
Management fees	19		
Miscellaneous	24		
Mortgage interest (paid to banks, etc.)	9		
Qualified mortgage insurance premiums	62		
Excess mortgage interest	67		
Other interest (not entered elsewhere)	29		
Painting and decorating	20		

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	21		
Plumbing and electrical	17		
Repairs	11		
Supplies	12		
Taxes - real estate	13		
Taxes - other (not entered elsewhere)	25		
Telephone	22		
Utilities	14		
Wages and salaries	15		
Other:			
	27		
	27		
	27		
	27		

OIL AND GAS

Production type (preparer use only)	42		
Cost depletion	43		
Percentage depletion rate or amount	502		
State cost depletion, if different (-1 if none)	76		
State % depletion rate or amount, if different (-1 if none)	506		

VACATION HOME

Number of days personal use	35		
Number of days owned (if optional method elected)	53		

INDIRECT EXPENSES

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

Advertising	204		
Association dues	216		
Auto and travel (not entered elsewhere)	205		
Cleaning and maintenance	206		
Commissions	207		
Gardening	218		
Insurance	208		
Legal and professional fees	210		
Licenses and permits	223		
Management fees	219		
Miscellaneous	224		
Mortgage interest (paid to banks, etc.)	209		
Qualified mortgage insurance premiums	262		
Excess mortgage interest	267		
Other interest (not entered elsewhere)	229		
Painting and decorating	220		

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	221		
Plumbing and electrical	217		
Repairs	211		
Supplies	212		
Taxes - real estate	213		
Taxes - other (not entered elsewhere)	225		
Telephone	222		
Utilities	214		
Wages and salaries	215		
Other:			
	227		
	227		
	227		
	227		
	227		
	227		
	227		
	227		
	227		

2012	**1040**	**US**	**Farm Income (Schedule F/Form 4835)**	**No.** ☐	**19**

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

GENERAL INFORMATION

Principal product	800	
Employer ID number	801	

Agricultural activity code	1	
Accounting method: 1=cash, 2=accrual	2	
1=spouse, 2=joint	5	
1=farm rental (Form 4835)	84	
1=crop insurance proceeds election	64	
Received applicable subsidy this year: 1=yes, 2=no	18	
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no	112	
1=did not "materially participate" (Schedule F only)	65	
1=did not actively participate (Form 4835 only)	85	
1=real estate professional (Form 4835 only)	3	
1=single member limited liability company	418	
% of ownership if not 100% (.xxxx) (Form 4835 only)	504	

FARM INCOME

		2012 Amount	2011 Amount
Cash method:			
Sales of livestock and other resale items	6		
Cost or basis of livestock or other resale items	7		
Sales of products raised	8		
Accrual method:			
Sales of livestock, produce, etc.	17		
Beginning inventory of livestock, etc.	23		
Cost of livestock, etc. purchased	24		
Ending inventory of livestock, etc.	25		
Other farm income:			
Total cooperative distributions	9		
Taxable cooperative distributions	10		
Total agricultural program payments (other than CRP)	11		
Taxable agricultural program payments (other than CRP)	12		
Total conservation reserve program payments	141		
Taxable conservation reserve program payments	142		
Commodity credit loans reported under election	13		
Total commodity credit loans forfeited or repaid	73		
Taxable commodity credit loans forfeited or repaid	74		
Total crop insurance proceeds received in 2012	14		
Taxable crop insurance proceeds received in 2012	75		
Taxable crop insurance proceeds deferred from 2011	76		
Custom hire (machine work) income not included above	15		

2012	1040	US	Farm Income (Sch. F/Form 4835) (cont.)	No. ☐	19 p2

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

FARM INCOME (continued)

Other income:

		2012 Amount	2011 Amount
	16		
	16		
	16		
	16		
	16		
	16		
	16		
	16		
	16		

FARM EXPENSES

Car and truck expenses (not entered elsewhere)	60		
Chemicals	27		
Conservation expenses	28		
Custom hire (machine work)	40		
Employee benefit programs	31		
Feed purchased	32		
Fertilizers and lime	33		
Freight and trucking	34		
Gasoline, fuel, and oil	35		
Insurance (other than health)	36		
Mortgage interest (paid to banks, etc.)	41		
Other interest (not entered elsewhere)	42		
Labor hired	37		
Pension and profit sharing - contributions	43		
Pension and profit sharing plans - admin. and education costs	57		
Rent - vehicles, machinery, and equipment (not entered elsewhere)	39		
Rent - other	44		
Repairs and maintenance	45		
Seeds and plants purchased	46		
Storage and warehousing	47		
Supplies purchased	48		
Taxes (not entered elsewhere)	49		
Utilities	50		
Veterinary, breeding, and medicine	51		
Capitalized preproductive period expenses (also enter below)	77		

Other expenses:

	53		
	53		
	53		
	53		
	53		
	53		
	53		
	53		
	53		
	53		

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

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
	800	801	802	161

S CORPORATION INFORMATION (20.2)

No.	Name of S corporation	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in S corporation
	800	801	802	161

2012	1040	US	Estate or Trust and REMIC Information	20.3,20.4

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

ESTATE OR TRUST INFORMATION (20.3)

No.	Name of Estate or Trust	Employer Identification Number	Tax Shelter Registration Number
	800	801	802

REMIC INFORMATION (20.4)

No.	Name of REMIC	Employer Identification Number
	800	801

2012	1040	US	Asset Disposition List	22

If you disposed of any business assets in 2012, please enter date sold, sales price, and expenses of sale.
For real estate transactions, be sure to attach all 1099-S forms and closing statements.

No.	Description of Property (Box 3)	Date Placed in Service	Date Sold (Box 1)	Sales Price (Box 2)	Cost or Basis	Expenses of Sale
	800	2	16	61	3	62

2012	1040	US	Asset Acquisition List	22 p2

If you purchased any business assets (furniture, equipment, vehicles, real estate, etc.) or converted any personal assets to business use in 2012, please enter all pertinent information below.

No.	Description of Property	Related Business or Activity	Preparer Use Only			Date Placed in Service	Cost or Basis	Preparer Use Only	
			Form	No. of Form	Category			Current Section 179	Method
	800		18	19	1	2	3	8	4

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

		2012 Amount	2011 Amount
Description of vehicle	800		
1=no evidence to support your deduction	30		
1=no written evidence to support your deduction	31		
1=vehicle is available for off-duty personal use	39		
1=no other vehicle is available for personal use	40		
1=vehicle used primarily by more than 5% owner	41		
Number of months your job required a vehicle (if not 12 months)	333		

AUTOMOBILE MILEAGE

Total mileage (for the tax year)	36		
Business mileage	37		
Commuting mileage (for the tax year)	38		
Average daily round-trip commute	334		

ACTUAL EXPENSES

Parking fees and tolls (business portion only)	335		
Gasoline, lube, oil	338		
Repairs	339		
Tires	340		
Insurance	341		
Miscellaneous	342		
Auto license (other than personal property taxes)	343		
Personal property taxes (based on car's value)	344		
Interest (car loan) (for Schedule C, E & F)	345		
Vehicle rent or lease payments	350		
Inclusion amount (enter as positive)	351		
Value of employer-provided vehicle on Form W-2 (2106)	346		

2012	1040	US	Adjustments to Income	24

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

TRADITIONAL IRA CONTRIBUTIONS

	2012 Amount				2011 Amount	
	Taxpayer		Spouse		Taxpayer	Spouse
IRA contributions you made or expect to make (1=maximum) ($5,000/$6,000 if 50 or older)	1		51			
Contributions made to date	3		53			
1=covered by plan, 2=not covered	5		55			
2012 payments from 1/1/13 to 4/15/13	8		58			

ROTH IRA CONTRIBUTIONS

	2012 Amount				2011 Amount	
	Taxpayer		Spouse		Taxpayer	Spouse
Roth IRA contributions you made or expect to make (1=maximum) ($5,000/$6,000 if 50 or older)	27		77			
Contributions made to date	30		80			

SEP, SIMPLE AND QUALIFIED PLANS (KEOGH)

	2012 Amount				2011 Amount	
	Taxpayer		Spouse		Taxpayer	Spouse
Profit-sharing (25%/1.25) contributions you made or expect to make (1=maximum)	10		60			
Money purchase (25%/1.25) contributions you made or expect to make (1=maximum)	11		61			
Defined benefit contributions you expect to make	13		63			
Self-employed SEP (25%/1.25) contributions you made or expect to make (1=maximum)	12		62			
Plan contribution rate if not .25 (.xxxx)	501		551			
Individual 401k: SE elective deferrals (except Roth) (1=max.)	44		94			
Individual 401k: SE designated Roth contributions (1=max.)	144		194			
SIMPLE contributions:						
Self-employed SIMPLE contributions you made or expect to make (1=maximum)	22		72			
Employer matching rate if not .03 (.xxxx)	502		552			
1=nonelective contributions (2%)	24		74			
Contributions made to date	14		64			

ADJUSTMENTS TO INCOME

	2012 Amount				2011 Amount	
	Taxpayer		Spouse		Taxpayer	Spouse
Self-employed health insurance:						
Total premiums (excluding long-term care)	16		66			
Long-term care premiums	26		76			
Student loan interest paid (1098-E, box 1)	23		73			
Educator expenses (kindergarten thru grade 12)	28		78			
Jury duty pay given to employer	43		93			
Expenses from rental of personal property	37		87			
Other adjustments to income:						
______________________________	19		69			
______________________________	19		69			
______________________________	19		69			

Alimony paid:	Taxpayer		Spouse	
Recipient's first name	39.____		89.____	
Recipient's last name	40.____		90.____	
Recipient's SSN	41.____		91.____	
Amount paid	18.____	**2011 amt:**	68.____	**2011 amt:**

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	4			
Doctors, dentists and nurses	5			
Hospitals and nursing homes	6			
Insurance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars)	7			
Long-term care premiums - taxpayer	17			
Long-term care premiums - spouse	58			
Insurance reimbursement (enter as a positive number)	8			
Lodging and transportation:				
Out-of-pocket expenses	9			
Medical miles driven	52			
Other medical and dental expenses:				
	10			
	10			
	10			

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

		2012 Amount	TS	2011 Amount
State income taxes - 1/12 payment on 2011 state estimate	11			
State income taxes - paid with 2011 state return extension	12			
State income taxes - paid with 2011 state return	13			
State income taxes - paid for prior years and/or to other state	14			
City/local income taxes - 1/12 payment on 2011 city/local estimate	211			
City/local income taxes - paid with 2011 city/local extension	212			
City/local income taxes - paid with 2011 city/local return	213			

SALES AND USE TAXES PAID

		2012 Amount	TS	2011 Amount
State and local sales taxes (except autos and special items)	91			
Use taxes paid on 2012 purchases	92			
Use taxes paid with 2011 state return	96			
Sales tax on autos not included above	349			
Sales tax on boats, aircraft, other special items	93			

OTHER TAXES PAID

		2012 Amount	TS	2011 Amount
Real estate taxes - principal residence:				
	15			
	15			
	15			
Real estate taxes - property held for investment	16			
Personal property taxes (including auto fees in some states. Provide a copy of tax notice)	18			
Foreign income taxes	19			
Other taxes:				
	20			
	20			
	20			

ORGANIZER

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

		2012 Amount	TS	2011 Amount
Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:				
	21			
	21			
	21			
Home mortgage interest not reported on Form 1098:				
Payee's name . . . . 85.___				
Payee's SSN or FEIN . . 86.___				
Payee's street address . 87.___				
Payee's city . . . . 88.___				
Payee's state . . . . 106.___				
Payee's ZIP code . . . . . . 108.___				
Amount paid	22.___			
Points not reported on Form 1098:				
	23			
	23			
Mortgage insurance premiums on post 12/31/06 contracts (Box 4)	39			
Investment interest (interest on margin accounts):				
	24			
	24			
Passive interest	27			
Certain home mortgage interest included above (6251)	30			

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:				
	32			
	32			
	32			
	32			
	32			
Volunteer expenses (out-of-pocket)	31			
Number of charitable miles	53			

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

Contributions by cash or check:				
	41			
	41			
	41			
	41			
	41			
Volunteer expenses (out-of-pocket)	40			
Number of charitable miles	54			

(T=taxpayer, S=spouse, Blank=joint)

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 26 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
	33			
	33			
	33			
	33			
30% limitation (see above):				
	34			
	34			
	34			
	34			
30% capital gain property (gifts of capital gain property to 50% limit orgs.):				
	35			
	35			
	35			
	35			
20% capital gain property (gifts of capital gain property to non-50% limit orgs.):				
	36			
	36			
	36			
	36			

MISCELLANEOUS DEDUCTIONS (subject to 2% AGI limit)

Union and professional dues	42			
Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):				
	43			
	43			
	43			
	43			
	43			
	43			
Investment expense:				
	44			
	44			
	44			
	44			
	44			
	44			
Tax return preparation fee	45			
Safe deposit box rental	46			
Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):				
	47			
	47			
	47			
	47			
	47			
	47			

(T=taxpayer, S=spouse, Blank=joint)

2012	1040	US	Itemized Deductions (continued)	25 p4

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

OTHER MISCELLANEOUS DEDUCTIONS

		2012 Amount	TS	2011 Amount
Estate tax, section 691(c)	49			
Other miscellaneous deductions:				
	50			
	50			
	50			
	50			
	50			
	50			
	50			
	50			
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	50			

(T=taxpayer, S=spouse, Blank=joint)

2012	1040	US	Itemized Deductions (continued)	25 p5

If either of the following conditions below apply to you, your home mortgage interest deduction may need to be limited and the input section provided below should be completed. If neither condition applies, enter home mortgage interest amounts on organizer sheet 25 p2.

1. Total home equity debt exceeded $100,000 at any time during 2012 ($50,000 if married filing separate). For this purpose, home equity debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used for purposes other than to buy, build, or improve your home. An example of this type of mortgage is a home equity loan use to pay off credit card bills, buy a car, or pay tuition.

2. Total home acquisition debt exceeded $1,000,000 at any time during 2012 ($500,000 if married filing separate). For this purpose, home acquisition debt is defined as any mortgages taken out after October 13, 1987 in which the proceeds were used to buy, build, or improve your home.

NOTE: When completing the input section below, grandfather debt represents loans taken out prior to October 14, 1987.

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

		2012 Amount	TS	2011 Amount
Fair market value of the property on the date that the last debt was secured	493			
Home acquisition and grandfather debt on the date that the last debt was secured	494			

LOAN INFORMATION

Loan #1

Lender's name	820			
Form (see table)	416			
Number of form	417			
1=taxpayer, 2=spouse, blank=joint	496			
Interest paid	401			
Points paid	402			
Total principal paid	404			
Lump sum principal payment (if paid off)	403			
Months outstanding (if not 12)	405			
Home acquisition debt balance - beginning of year	407			
Home acquisition debt borrowed in 2012	408			
Home equity debt balance - beginning of year	410			
Home equity debt borrowed in 2012	411			
Grandfather debt balance - beginning of year	413			

Loan #2

Lender's name	830			
Form (see table)	436			
Number of form	437			
1=taxpayer, 2=spouse, blank=joint	497			
Interest paid	421			
Points paid	422			
Total principal paid	424			
Lump sum principal payment (if paid off)	423			
Months outstanding (if not 12)	425			
Home acquisition debt balance - beginning of year	427			
Home acquisition debt borrowed in 2012	428			
Home equity debt balance - beginning of year	430			
Home equity debt borrowed in 2012	431			
Grandfather debt balance - beginning of year	433			

Form

1 = Schedule A (default)
2 = Business use of home
3 = Schedule E

2012	1040	US	Noncash Contributions (Form 8283)	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. ☐		Name of charitable organization (donee)	800	
		Street address	801	
		City	802	
		State	831	
		ZIP code	832	
		1=spouse, 2=joint	1	
		Property description (other than vehicle)	803	
	Vehicle	Identification number (VIN)	204	
		Year (yyyy)	14	
		Make and model	829	
		Condition and mileage	830	
		Date of contribution (m/d/y)	5	
		Date acquired by donor (m/y)	6	
		How acquired by donor (Table 1 or describe)	804	
		Donor's cost or basis	7	
		Fair market value	8	
		Method used to determine FMV (Table 2 or describe)	805	

No. ☐		Name of charitable organization (donee)	800	
		Street address	801	
		City	802	
		State	831	
		ZIP code	832	
		1=spouse, 2=joint	1	
		Property description (other than vehicle)	803	
	Vehicle	Identification number (VIN)	204	
		Year (yyyy)	14	
		Make and model	829	
		Condition and mileage	830	
		Date of contribution (m/d/y)	5	
		Date acquired by donor (m/y)	6	
		How acquired by donor (Table 1 or describe)	804	
		Donor's cost or basis	7	
		Fair market value	8	
		Method used to determine FMV (Table 2 or describe)	805	

1 **How Property was Acquired**

1 = Purchase
2 = Gift
3 = Inheritance
4 = Exchange

2 **Method Used to Determine FMV**

1 = Appraisal
2 = Thrift shop value
3 = Catalog
4 = Comparable sales

For other methods, see IRS Pub. 561.

2012	1040	US	Business Use of Home (Form 8829)	No. ☐	29

Please enter 2012 indirect expenses in full. Nonbusiness portion will carry to Schedule A.
Business percentage will be applied to indirect expenses only.

BUSINESS USE OF HOME

		2012 Amount	2011 Amount
Form	45		
Number of form (e.g., enter 2 for Schedule C number 2)	46		
Business use area (square footage)	2		
Total area of home (square footage)	1		
Total hours facility used (for daycare facilities only)	3		
Total hours available (if not 8,760)	9		
% (.xx) or amount of gross income from home if not 100% (-1 if none)	502		
% (.xx) or amount of expenses from home if not 100% (-1 if none)	503		

INDIRECT EXPENSES

NOTE: Indirect expenses are for keeping up and running your entire home. They benefit both the business and personal parts of your home.

Mortgage interest	11		
Real estate taxes	12		
Qualified mortgage insurance premiums	51		
Casualty losses	13		
Insurance	14		
Miscellaneous	15		
Rent	16		
Repairs and maintenance	17		
Utilities	18		
Excess mortgage interest	19		
Other indirect expenses:			
	20		
	20		
	20		
	20		

DIRECT EXPENSES

NOTE: Direct expenses benefit only the business part of your home. They include painting or repairs made to specific areas or rooms used for business.

Mortgage interest	21		
Real estate taxes	22		
Qualified mortgage insurance premiums	52		
Casualty losses	23		
Insurance	24		
Miscellaneous	25		
Rent	26		
Repairs and maintenance	27		
Utilities	28		
Excess mortgage interest	29		
Excess casualty losses	30		
Allowable casualty losses	31		
Other direct expenses:			
	32		
	32		
	32		
	32		

2012	1040	US	Employee/Vehicle Bus. Exp. (Form 2106)	No. ☐	30

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

GENERAL INFORMATION

Occupation, if different from Form 1040	800	
Form	13	
Number of form (1=first Schedule C, 2=second, etc.)	14	
1=spouse	1	
1=performance artist, 2=handicapped, 3=fee-basis government official	8	

EMPLOYEE BUSINESS EXPENSES

		2012 Amount	2011 Amount
Meal and entertainment expenses	44		
Reimbursements for meals and entertainment not on W-2, box 1	45		
1=Department of Transportation (80% meal allowance)	50		
Local transportation (bus, taxi, train, etc.)	7		
Travel expenses while away from home overnight	9		
Reimbursements not included on Form W-2, box 1	12		
Other business expenses:			
	10		
	10		
	10		
	10		
	10		
	10		
	10		
	10		
	10		
	10		

2012	1040	US	Vehicle Expenses (Form 2106) (cont.)	No. ☐	30 p2

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

VEHICLE INFORMATION

		2012 Amount	2011 Amount
1=vehicle used primarily by more than 5% owner	11		
1=vehicle is available for off-duty personal use	4		
1=no other vehicle is available for personal use	2		
1=no evidence to support your deduction	5		
1=no written evidence to support your deduction	6		

VEHICLE 1

Description of vehicle	801		
Date placed in service (m/d/y)	15		
Total mileage (for the tax year)	16		
Business mileage	17		
Commuting mileage (for the tax year)	19		
Average daily round-trip commute	18		
Number of months of vehicle business use (if not 12)	80		
Parking fees and tolls (business portion only)	70		
Actual expenses:			
Gasoline, lube, oil	51		
Repairs	52		
Tires	53		
Insurance	54		
Miscellaneous	22		
Auto license (other than personal property taxes)	55		
Personal property taxes (based on car's value)	56		
Interest (car loan) (for Schedule C, E & F)	57		
Vehicle rent or lease payments	23		
Inclusion amount (enter as positive)	20		
Value of employer-provided vehicle on Form W-2 (2106)	24		

VEHICLE 2

Description of vehicle	802		
Date placed in service (m/d/y)	29		
Total mileage (for the tax year)	30		
Business mileage	31		
Commuting mileage (for the tax year)	33		
Average daily round-trip commute	32		
Number of months of vehicle business use (if not 12)	112		
Parking fees and tolls (business portion only)	71		
Actual expenses:			
Gasoline, lube, oil	61		
Repairs	62		
Tires	63		
Insurance	64		
Miscellaneous	36		
Auto license (other than personal property taxes)	65		
Personal property taxes (based on car's value)	66		
Interest (car loan) (for Schedule C, E and F)	67		
Vehicle rent or lease payments	37		
Inclusion amount (enter as positive)	34		
Value of employer-provided vehicle on Form W-2 (2106)	38		

2012	1040	US	Foreign Income Exclusion (Form 2555)	No.	31.1

Please enter all pertinent 2012 information.

GENERAL INFORMATION

1=spouse	1	
Foreign address of taxpayer, if different from Form 1040:		
Street address	800	
City	821	
Region	822	
Postal code	823	
Country	824	
Employer:		
Name	801	
U.S. street address	802	
U.S. city	825	
U.S. state	826	
U.S. ZIP code	827	
Foreign street address	803	
Foreign city	828	
Foreign region	829	
Foreign postal code	830	
Foreign country	831	
Employer type: 1=foreign entity, 2=U.S. company, 3=self, 4=foreign affiliate of U.S. company, 5=other	11	
Employer type, if other	804	

Type of exclusion revoked if revoked in earlier year (if applicable):		Tax year revocation was effective	
806.___		12.___	
806.___		12.___	
806.___		12.___	

Country of citizenship	807	

City and country of separate foreign residence if maintained due to adverse living conditions (if applicable):		Number of days during tax year at separate foreign address (if applicable)	
808.___		13.___	
808.___		13.___	
808.___		13.___	

Tax homes(s) during tax year:		Dates tax home(s) were established (m/d/y)	
809.___		14.___	
809.___		14.___	
809.___		14.___	

2012	**1040**	**US**	**Foreign Income Exclusion (2555)**	**No.** ☐	**31.1** p2

Please enter all pertinent 2012 information.

TRAVEL INFORMATION

NOTE: Please enter all travel for 2012 as well as travel for 2013 known to date.

Travel Type (table)		Name of country (if not United States)		Date arrived		Date left		Days in U.S. on business	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	
18.____		810.____		19.____		20.____		21.____	

BONA FIDE RESIDENCE TEST AND PHYSICAL PRESENCE TEST

Beginning date for bona fide residence (m/d/y)	24	
Ending date for bona fide residence (m/d/y)	25	
Living quarters in foreign country: 1=purchased home, 2=rented house or apartment, 3=rented room, 4=quarters furnished by employer	26	

Names of family living abroad with taxpayer (if applicable):		Period family lived abroad	
811.____		813.____	
811.____		813.____	
811.____		813.____	

1=submitted statement to country of bona fide residence	27	
1=required to pay income tax to country of bona fide residence	28	
Contractual terms relating to length of employment abroad	814	
Type of visa you entered foreign country under	815	
Explanation why visa limited stay or employment in country (if applicable)	816	

Address of home in U.S. maintained while living abroad (if applicable):		1=U.S. home rented (if applicable)		Names of occupants in U.S. home (if applicable)		Relationship of occupants in U.S. home (if applicable)	
817.____		29.____		818.____		819.____	
817.____		29.____		818.____		819.____	
817.____		29.____		818.____		819.____	

Principal country of employment	820	

FOREIGN HOUSING EXPENSES

		2012 Amount	2011 Amount
Qualified housing expenses	41		

Location of housing expenses:		Qualifying days in location (multiple locations only)	
46.____		47.____	
46.____		47.____	
46.____		47.____	

Travel Type

1 = Travel to U.S. (default)
2 = Travel to foreign country
3 = Travel to restricted country

2012	1040	US	**Foreign Income Exclusion (Form 2555)**	No. ☐	31.2

Please enter all pertinent 2012 amounts and attach all W-2 forms, or other wage statements.
Enter amounts in U.S. dollars only. Last year's amounts are provided for your reference.

FOREIGN WAGES, SALARIES, TIPS

		2012 Amount	2011 Amount
Name or number	157		
1=spouse	178		
1=retirement plan (Box 13)	2		
Name of employer (Box c)	818		
Wages, tips, other compensation (Box 1)	179		
Federal income tax withheld (Box 2)	180		
Social security tax withheld (Box 4)	182		
Medicare tax withheld (Box 6)	184		
State income tax withheld (Box 17)	185		
Local income tax withheld (Box 19)	186		

FOREIGN ALLOWANCES, REIMBURSEMENTS AND OTHER EARNED INCOME

Noncash Income

Home (lodging)	135		
Meals	136		
Car	137		

Other properties or facilities:

38.___		138.___		
38.___		138.___		
38.___		138.___		
38.___		138.___		

Allowances and Reimbursements

Cost of living and overseas differential	139		
Family	140		
Education	141		
Home leave	142		
Quarters	143		

Other purposes:

44.___		144.___		
44.___		144.___		
44.___		144.___		
44.___		144.___		

Meals and lodging provided for the convenience of the Employer (excludable under section 119)	145		

Other Foreign Earned Income

32.___		132.___		
32.___		132.___		
32.___		132.___		
32.___		132.___		

2012 Days Worked Allocation Information

Total number of days worked (if not 240)	131		
Total days worked before and after foreign assignment	155		
Foreign days worked before and after foreign assignment	156		

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.	3		53			
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).	5		55			
Contributions included above that were made after you became eligible for Medicare.	32		82			
Contributions made to date	39		89			

HSA DISTRIBUTIONS

Total HSA distribution received (1099-SA, box 1) . .	15		65			
Distributions included above that were rolled over to another HSA	16		66			
Total unreimbursed qualified medical expenses. . . .	17		67			

2012	1040	US	Child and Dependent Care Expenses (Form 2441)	33.1,33.2

Please enter all pertinent 2012 information. Last year's amounts are provided for your reference. You must have paid for the care of one or more dependents enabling you to work or attend school to qualify for this credit.

DEPENDENT CARE EXPENSES (33.1)

	2012 Amount				2011 Amount	
		Taxpayer		Spouse	Taxpayer	Spouse
Dependent care expenses incurred but not paid in 2012	3		53			
Employer-provided benefits forfeited in 2012	6		56			

PERSONS AND EXPENSES QUALIFYING FOR DEPENDENT CARE CREDIT

No.	First name	17		
	Last name	18		
	Date of birth (m/d/y)	22		
	Social security number	19		
	Qualified dependent care expenses incurred and paid in 2012	20		**2011 amt:**
	1=disabled	23		
	1=spouse, 2=joint	21		

No.	First name	17		
	Last name	18		
	Date of birth (m/d/y)	22		
	Social security number	19		
	Qualified dependent care expenses incurred and paid in 2012	20		**2011 amt:**
	1=disabled	23		
	1=spouse, 2=joint	21		

No.	First name	17		
	Last name	18		
	Date of birth (m/d/y)	22		
	Social security number	19		
	Qualified dependent care expenses incurred and paid in 2012	20		**2011 amt:**
	1=disabled	23		
	1=spouse, 2=joint	21		

PERSONS OR ORGANIZATIONS PROVIDING CARE (33.2)

No.	Name of provider	10		
	Street address	11		
	City, state, ZIP code	12		
	Identification number (SSN or EIN)	13		
	Amount paid to care provider in 2012	14		**2011 amt:**
	1=spouse, 2=joint	15		

No.	Name of provider	10		
	Street address	11		
	City, state, ZIP code	12		
	Identification number (SSN or EIN)	13		
	Amount paid to care provider in 2012	14		**2011 amt:**
	1=spouse, 2=joint	15		

2012	1040	US	Qualified Adoption Expenses (Form 8839)	37

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

ELIGIBLE CHILDREN

				2012 Amount	2011 Amount
No. ☐	First name		11		
	Last name		12		
	Identification number		13		
	Date of birth (m/d/y)		14		
	1=born before 1995 and was disabled		15		
	1=special needs child		16		
	1=foreign child		17		
	1=adoption was not final in 2012		22		
	Qualified Adoption Expenses Paid in	2011 for adoption not finalized by end of 2012	23		
		Prior years for adoption of foreign child finalized in 2012	26		
		2011 and 2012 for adoption finalized in 2012	20		
		2012 for adoption finalized before 2012	24		
	1=spouse, 2=joint		21		

No. ☐	First name		11		
	Last name		12		
	Identification number		13		
	Date of birth (m/d/y)		14		
	1=born before 1995 and was disabled		15		
	1=special needs child		16		
	1=foreign child		17		
	1=adoption was not final in 2012		22		
	Qualified Adoption Expenses Paid in	2011 for adoption not finalized by end of 2012	23		
		Prior years for adoption of foreign child finalized in 2012	26		
		2011 and 2012 for adoption finalized in 2012	20		
		2012 for adoption finalized before 2012	24		
	1=spouse, 2=joint		21		

No. ☐	First name		11		
	Last name		12		
	Identification number		13		
	Date of birth (m/d/y)		14		
	1=born before 1995 and was disabled		15		
	1=special needs child		16		
	1=foreign child		17		
	1=adoption was not final in 2012		22		
	Qualified Adoption Expenses Paid in	2011 for adoption not finalized by end of 2012	23		
		Prior years for adoption of foreign child finalized in 2012	26		
		2011 and 2012 for adoption finalized in 2012	20		
		2012 for adoption finalized before 2012	24		
	1=spouse, 2=joint		21		

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	17		
First name	12		
Last name	13		
Social security number	14		
Number of years hope credit claimed	23		
Number of years American opportunity credit claimed	35		
1=student was NOT entrolled at least half-time for at least one academic period that began in 2012 at an eligible institution in a qualified program	41		
1=student completed first four years of post-secondary education before 2012	32		
1=student was convicted, before the end of 2012, of a felony for possession or distribution of a controlled substance	42		

EDUCATIONAL INSTITUTION ATTENDED (#1)

Name	850.___	
Street address	851.___	
City	852.___	
State	853.___	
ZIP code	854.___	
1=2012 Form 1098-T received	43.___	
1=2012 Form 1098-T received with Box 2 & 7 completed	44.___	
Federal ID number from Form 1089-T	858.___	

EDUCATIONAL INSTITUTION ATTENDED (#2)

Name	850.___	
Street address	851.___	
City	852.___	
State	853.___	
ZIP code	854.___	
1=2012 Form 1098-T received	43.___	
1=2012 Form 1098-T received with Box 2 & 7 completed	44.___	
Federal ID number from Form 1089-T	858.___	

QUALIFIED EDUCATION EXPENSES

		2012 Amount	2011 Amount
Qualified tuition & fees paid in 2012 (net of refund or assistance, & not entered elsewhere)	16		
Books & supplies required to be purchased from institution	27		
Books & supplies not entered above	28		
Amount of prior year refund or assistance *	20		

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

2012	1040	US	Household Employment Taxes (Schedule H)	42

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

HOUSEHOLD EMPLOYMENT TAXES

NOTE: If you paid any one household employee cash wages of $1,700 or more in 2012; withheld federal income tax during 2012 for any household employee; or paid total cash wages of $1,000 or more in any calendar quarter of 2011 or 2012 to household employees, please complete the following:

Employer identification number	1	
1=spouse, 2=joint	2	

Social security, Medicare and income taxes:		2012 Amount	2011 Amount
1=paid any one employee cash wages of $1,700 or more	4		
1=withheld federal income tax for household employee	5		
Total cash wages subject to social security taxes	6		
Total cash wages subject to Medicare taxes	7		
Federal income tax withheld	8		
Advance earned income credit payments	9		
Taxes withheld from state disability payments	33		

Federal unemployment tax:

1=paid total cash wages of $1,000 or more in any calendar quarter of 2011 or 2012	10		
Total cash wages subject to FUTA tax	11		
1=paid unemployment contributions to only one state	12		
1=paid all state unemployment contributions by 4/15/13	13		
1=all wages taxable for FUTA were also taxable for state unemployment	14		
Name of state	15		
Contributions paid to state unemployment fund	17		

2012	1040	US	Parent's Election to Report Child's Inc.	No. ☐	44

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

CHILD'S INFORMATION

First name	800	
Last name	803	
Social security number	801	
Date of birth (m/d/y)	26	
1=nontaxable to federal	19	
1=nontaxable to state	18	

INTEREST INCOME (Form 1099-INT)

		2012 Amount	2011 Amount
Banks, credit unions, etc. (Box 1):			
	3		
	3		
U.S. bonds, T-bills, etc. (nontaxable to state) (Box 3):			
	17		
	17		
Tax-exempt interest:			
Total municipal bonds	16		
In-state municipal bonds	4		
Adjustments:			
Nominee distribution	5		
Accrued interest	6		
Tax-exempt interest (1099-INT in error)	22		
OID adjustment	7		
ABP adjustment	8		
Foreign:			
1=interest in or authority over foreign account	9		
Name of foreign country	802		
1=grantor/transferor or received distribution from foreign trust	10		
Post 8/7/86 private activity bond interest (included above) (6251)	20		

DIVIDEND INCOME (Form 1099-DIV)

Total ordinary dividends (Box 1a):			
	11		
	11		
Qualified dividends (Box 1b)	29		
Total capital gain distributions (Box 2a):			
	13		
	13		
Unrecaptured section 1250 gain (Box 2b)	24		
Section 1202 gain (Box 2c)	2		
Collectibles (28%) gain (Box 2d)	23		
Nontaxable distributions (Box 3)	12		
Tax-exempt interest:			
Total municipal bonds	15		
In-state municipal bonds	21		
Nominee distributions:			
Ordinary dividends	14		
Qualified dividends	31		
Capital gain distributions	25		
Alaska permanent fund dividends included above	27		

2012	1040	US	Additional Information

Please furnish any additional information or supporting details not provided elsewhere in this tax organizer.