

Adrian A. Gaspar & Company, LLP
Certified Public Accountants
1035 Cambridge Street, Suite 14
Cambridge, MA 02141

The 2011 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2011 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. Prior year data is included on the organizer sections for your reference.

Please provide us with the following additional information:

- A copy of your 2010 tax return, if not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- Form(s) 1099-K (Merchant Card and Third Party Network Payments)
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

Thank you for your help in the completion of the Tax Organizer. Please contact us if you need further assistance.

Sincerely,

Adrian A. Gaspar & Company, LLP

Adrian A. Gaspar & Company,LLP
Certified Public Accountants
1035 Cambridge Street, Suite 14
Cambridge, MA 02141

This letter confirms our understanding of the terms and objectives of our engagement and the nature and limitations of the tax services we will provide.

We will prepare your 2011 federal and required state(s) income tax returns from the information you will provide, such as, W-2s, 1099s, 1098s, and if necessary bank statements, canceled checks, check stubs or register, payroll records, and other relevant documents.

If you made any payments in 2011 that would require you to file Form(s) 1099, you did or will file all required Forms 1099. If you maintain a financial interest, signature authority, or other authority over one or more financial accounts (such as a bank account, securities account, or brokerage account) in foreign countries, you have informed us of such.

We will not audit or otherwise attempt to verify the information you have submitted, although we may ask for clarification or further details on some matters. Our services in connection with the preparation of your income tax returns do not include any procedures designed to detect defalcations, errors, irregularities, or illegal acts should they exist.

You agree to provide and maintain all the information required for the preparation of complete and accurate returns. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that your income and expenses are supported by records as required by law. It is your responsibility to examine the returns, accompanying schedules and statements and therefore, you should review them carefully before you sign them. The law provides for a penalty to be imposed where a taxpayer makes a substantial understatement of their tax liability.

Fees for services to be provided will be computed at our standard hourly rate for tax services plus out-of-pocket expenses. Invoices are due and payable upon presentation.

Any additional services to be provided will be computed at our standard hourly rate.

Please indicate your acceptance of the above understanding by signing below. If you have special projects or tax returns, other than individual income tax returns, with which we can assist, please let us know.

Sincerely,
Adrian A. Gaspar & Company, LLP

Accepted by: _____ Date: _____

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 1035 Cambridge Street, Suite 14
 Cambridge, MA 02141
 Telephone number: 617-621-0500
 Fax number: 617-621-0310
 E-mail address: CPAS@GASPARCO.COM

Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2011 tax return. Please enter all pertinent 2011 information.

CLIENT INFORMATION

Taxpayer

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		
Home phone		
Work phone		
Work extension		
Cell phone		
E-mail address		

Address

In care of
 Street address
 Apartment number
 City
 State
 ZIP code

DEPENDENTS

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		

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Please enter all pertinent 2011 information. If you have attached a government form for an item, check the box and do not enter a 2011 amount.

WAGES, SALARIES AND TIPS

Employer name:

Form with 5 checkboxes and 5 horizontal lines for employer name.

2011 Amount

2010 Amount

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms W-2' and 5 rows.

INTEREST INCOME

Payer name:

Form with 5 checkboxes and 5 horizontal lines for payer name.

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms 1099-INT' and 5 rows.

DIVIDEND INCOME

Payer name:

Form with 5 checkboxes and 5 horizontal lines for payer name.

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms 1099-DIV' and 5 rows.

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

Form with 5 checkboxes and 5 horizontal lines for payer name.

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms 1099-R & W-2G' and 5 rows.

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

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history)
Form 1099-MISC - Miscellaneous income
Form 1099-K - Merchant card and third party network payments
Form 1099-S - Sales of real estate (also include closing statements)

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms 1099' and 5 rows.

- Form 1099-G - State tax refunds.....

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms 1099' and 5 rows.

Taxpayer:

- Form SSA-1099 - Social security benefits
Form 1099-G - Unemployment compensation

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms 1099' and 5 rows.

Spouse:

- Form SSA-1099 - Social security benefits
Form 1099-G - Unemployment compensation

Table with 2 columns: 2011 Amount, 2010 Amount. Contains 'Attach Forms 1099' and 5 rows.

MISCELLANEOUS INCOME

Taxpayer: Alimony received
Spouse: Alimony received
Other:

Table with 2 columns: 2011 Amount, 2010 Amount. 5 rows.

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RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: Traditional IRA contributions (1=maximum)
 Roth IRA contributions (1=maximum).....
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)
 Spouse: Traditional IRA contributions (1=maximum)
 Roth IRA contributions (1=maximum).....
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)

2011 Amount	2010 Amount

OTHER GOVERNMENT FORMS - DEDUCTIONS

Form 1098-E - Student loan interest
 Form 1098-T - Tuition and related expenses.....

Attach Forms 1098	
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ADJUSTMENTS TO INCOME

Taxpayer:
 Self-employed health insurance premiums
 Educator expenses
 Expenses from rental of personal property
 Other adjustments to income:

 Alimony paid - Recipient name & SSN

Spouse:
 Self-employed health insurance premiums
 Educator expenses
 Expenses from rental of personal property
 Other adjustments to income:

 Alimony paid - Recipient name & SSN

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs
 Doctors, dentists and nurses
 Hospitals and nursing homes
 Insurance premiums
 Long-term care premiums - taxpayer.....
 Long-term care premiums - spouse.....
 Insurance reimbursement.....
 Out-of-pocket lodging and transportation expenses
 Number of medical miles
 Other: _____

TAXES PAID

State income taxes - 1/11 payment on 2010 state estimate.....
 State income taxes - paid with 2010 state extension.....
 State income taxes - paid with 2010 state return.....
 State income taxes - paid for prior years and/or to other states.....

2011	1040	US	Client Information	1
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Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2011 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table)		<p align="center">Filing Status</p> <p>1 = Single 2 = Married filing joint 3 = Married filing separate 4 = Head of household 5 = Qualifying widow(er)</p>
	1=married filing separate and lived with spouse		
	Year spouse died, if qualifying widow(er) (2009 or 2010)		
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		
Foreign Address	Region		
	Postal code		
	Country		

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Client Information (continued)

1 p2

Please add, change or delete information for 2011.

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

1 p2

2011	1040	US/MA	Dependents	2
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Please add, change or delete information for 2011.

DEPENDENTS

	Dependent	Dependent	
First name			<p>Type of Dependent</p> <p>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</p> <p>Earned Income Credit</p> <p>1 = When applicable (default) 2 = Student age 19 to 23 3 = Disabled 4 = Force 5 = Suppress</p>
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			
1=disabled			
	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			
1=disabled			
	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			
1=disabled			
	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			
1=disabled			

2011	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2011, 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 2011?

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 2011?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2011, 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 2011?
- Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2012?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
- Did you purchase a home in 2011 and you were overseas on official extended duty?
- 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?

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Miscellaneous Questions (continued)

If any of the following items pertain to you or your spouse for 2011, 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 2011?
- 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 2010 taxes to your 2011 estimated tax (instead of being refunded)?
- If you have an overpayment of 2011 taxes, do you want the excess applied to your 2012 estimated tax (instead of being refunded)?
- Do you expect your 2012 taxable income and withholdings to be different from 2011?

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?

2011	1040	US	Miscellaneous Questions (continued)
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If any of the following items pertain to you or your spouse for 2011, please check the appropriate box and provide additional information if necessary.

- | YES | NO | MISCELLANEOUS (continued) |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur moving expenses due to a change of employment? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any household employees? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$13,000, or any gifts to a trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2011? |

2011	1040	US	Miscellaneous Questions
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If any of the following items pertain to you or your spouse for 2011, please check the appropriate box and provide additional information if necessary.

- | YES | NO | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you transfer or rollover any amount from one retirement plan to another? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss because of damaged or stolen property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your car on the job (other than to and from work)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to electronically file your tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the IRS or the State taxing agency? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2011? |

2011

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Miscellaneous Questions

- 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?
- Did you make any payments in 2011 that would require you to file Form(s) 1099?
- If "Yes", did you or will you file all required Forms 1099?
- Were you a Massachusetts resident enrolled in a qualified health care plan? Please provide a copy of Form MA 1099-HC.
- Was your spouse a Massachusetts resident enrolled in a qualified health care plan? Please provide a copy of Form MA 1099-HC.
- Did you use a Fastlane or T-pass in excess of \$150 in 2011?
- Did your spouse use a Fastlane or T-pass in excess of \$150 in 2011?
- If you were a Massachusetts resident, did you (or your spouse) purchase any taxable goods outside of the Commonwealth?

Please enter all pertinent 2011 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		
1=state direct deposit		
1=state electronic payment of balance due		

BANK INFORMATION

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

2011 ESTIMATED TAX / 1040-ES (6)

Federal

	Amount Paid	Date Paid	TS	2011 Voucher Amount
Overpayment applied from 2010				
1st quarter payment (due 4/18/11)				
2nd quarter payment (due 6/15/11)				
3rd quarter payment (due 9/15/11)				
4th quarter payment (due 1/17/12)				
Additional Estimated Tax Payments				
Paid with extension (not later than 4/17/12)				

State

	Amount Paid	Date Paid	TS	2011 Voucher Amount
Overpayment applied from 2010				
1st quarter payment (due 4/18/11)				
2nd quarter payment (due 6/15/11)				
3rd quarter payment (due 9/15/11)				
4th quarter payment (due 1/17/12)				
Additional Estimated Tax Payments				
Paid with extension (not later than 4/17/12)				

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

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

7.1

Please enter all pertinent 2011 information.

APPLICATION OF 2011 OVERPAYMENT (7.1)

If you have an overpayment of 2011 taxes, do you want the excess refunded? or applied to 2012 estimate? ...

Other (please explain): _____

2012 ESTIMATED TAX INFORMATION

Do you expect your 2012 taxable income to be different from 2011? Yes No
If "yes" explain any differences in income, deductions, dependents, etc.: _____

Do you expect your 2012 withholding to be different from 2011? Yes No
If "yes" explain any differences: _____

7.1

2011	1040	US	Wages, Pensions, Gambling Winnings	10, 13.1, 13.2
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Please enter all pertinent 2011 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)		Wages, Tips, Other Compensation (Box 1)	Tax Withheld					2010 Wages
		1=spouse			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 12/31/11	2010 Distribution
		Distribution code #1					Federal (Box 4)	State (Box 12)		
		1=IRA/SEP/SIMPLE								
		1=spouse								

GAMBLING WINNINGS (W-2G) (13.2)

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld		2010 Winnings
				Federal (Box 2)	State (Box 14)	

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

	2011 Amount	TS	2010 Amount	
Total gambling losses				
Winnings not reported on Form W-2G				

10, 13.1, 13.2

2011	1040	US	Miscellaneous Income	14.1
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Please enter all pertinent 2011 amounts and attach all 1099-MISC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.

MISCELLANEOUS INCOME

	2011 Amount		2010 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

Please add, change or delete 2011 information as appropriate.
Be sure to attach all 1099-G forms.

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

2011 1099-G Amount

No. <input style="width:40px;" type="text"/>	Name of payer.....		
	1=spouse.....		
	Unemployment compensation:		
	Total received (Box 1).....		
	2011 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 2010 (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 style="width:40px;" type="text"/>	Name of payer.....		
	1=spouse.....		
	Unemployment compensation:		
	Total received (Box 1).....		
	2011 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 2010 (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).....			

2011	1040	US	Education Distributions (ESA's and QTP's)	14.3
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Please enter all pertinent 2011 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)

2011 Amount

2010 Amount

No. <input style="width:40px;" type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits).....		
	Elementary & secondary education (net of nontaxable benefits).....		
	Form 1099-Q:		
	Gross distributions (Box 1).....		
	Earnings (Box 2).....		
	Basis (Box 3).....		
	Rollover: 1=nontaxable, 2=taxable (Box 4).....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5).....		
	ESA's only:		
2011 contributions to this ESA.....			
Value of this account at 12/31/11 (plus outstanding rollovers).....			
Basis in this ESA as of 12/31/10.....			

No. <input style="width:40px;" type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits).....		
	Elementary & secondary education (net of nontaxable benefits).....		
	Form 1099-Q:		
	Gross distributions (Box 1).....		
	Earnings (Box 2).....		
	Basis (Box 3).....		
	Rollover: 1=nontaxable, 2=taxable (Box 4).....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5).....		
	ESA's only:		
2011 contributions to this ESA.....			
Value of this account at 12/31/11 (plus outstanding rollovers).....			
Basis in this ESA as of 12/31/10.....			

No. <input style="width:40px;" type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits).....		
	Elementary & secondary education (net of nontaxable benefits).....		
	Form 1099-Q:		
	Gross distributions (Box 1).....		
	Earnings (Box 2).....		
	Basis (Box 3).....		
	Rollover: 1=nontaxable, 2=taxable (Box 4).....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5).....		
	ESA's only:		
2011 contributions to this ESA.....			
Value of this account at 12/31/11 (plus outstanding rollovers).....			
Basis in this ESA as of 12/31/10.....			

2011

1040

US

Business Income (Schedule C)

No.

16

Please enter all pertinent 2011 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

	2011 Amount	2010 Amount
Merchant card and third party payments (Form 1099-K, Box 1) *		
Gross receipts or sales (Form 1099-MISC, box 7)		
Returns and allowances		
Other income:		
.....		
.....		
.....		
.....		
.....		
.....		
.....		

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		

Series: 51 * NOTE: Based on late revisions to the 2011 Schedules C, Merchant card and third party payments from Form 1099-K, Box 1 will not be reported separately (for 2011 only).

2011	1040	US	Business Income (Schedule C) (cont.)	No. <input style="width:30px;" type="text"/>	16 p2
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Please enter all pertinent 2011 amounts. Last year's amounts are provided for your reference.

EXPENSES

	2011 Amount	2010 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.

Please enter all pertinent 2011 amounts. Last year's amounts are provided for your reference.

PRIOR YEAR INSTALLMENT SALE

		2011 Amount	2010 Amount
No. <input style="width:40px;" type="text"/>	Description of property		
	Date acquired (m/d/y)		
	Date sold (m/d/y)		
	Gross profit ratio (.xxxx)		
	Current year principal payments (-1 if none)		
No. <input style="width:40px;" type="text"/>	Description of property		
	Date acquired (m/d/y)		
	Date sold (m/d/y)		
	Gross profit ratio (.xxxx)		
	Current year principal payments (-1 if none)		
No. <input style="width:40px;" type="text"/>	Description of property		
	Date acquired (m/d/y)		
	Date sold (m/d/y)		
	Gross profit ratio (.xxxx)		
	Current year principal payments (-1 if none)		
No. <input style="width:40px;" type="text"/>	Description of property		
	Date acquired (m/d/y)		
	Date sold (m/d/y)		
	Gross profit ratio (.xxxx)		
	Current year principal payments (-1 if none)		
No. <input style="width:40px;" type="text"/>	Description of property		
	Date acquired (m/d/y)		
	Date sold (m/d/y)		
	Gross profit ratio (.xxxx)		
	Current year principal payments (-1 if none)		
No. <input style="width:40px;" type="text"/>	Description of property		
	Date acquired (m/d/y)		
	Date sold (m/d/y)		
	Gross profit ratio (.xxxx)		
	Current year principal payments (-1 if none)		
No. <input style="width:40px;" type="text"/>	Description of property		
	Date acquired (m/d/y)		
	Date sold (m/d/y)		
	Gross profit ratio (.xxxx)		
	Current year principal payments (-1 if none)		

2011

1040

US

Sale of Home & Moving Expenses

17, 27

If you sold your home or moved in 2011, 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)
Date acquired (m/d/y)
Date sold (m/d/y) (Box 1)
Sales price (Box 2)
1=sale of home
1=owned and used property as main home for at least 2 of 5 years before sale
1=first-time homebuyer credit was previously taken on this home
1=business use in year of sale
Number of days after December 31, 2008 that home was not used as principal residence

Adjusted Basis

Original cost
Improvements:
Adjusted basis

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

Total expenses of sale

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)
1=sale due to change in health, employment or unforeseen circumstances.
Days used as main home - taxpayer.
Days used as main home - spouse.
Days property owned - taxpayer.
Days property owned - spouse.

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

1=spouse, 2=joint.
1=armed forces move due to permanent change of station.
Miles from old home to new work place.
Miles from old home to old work place.
Expenses for transportation and storage of household goods and personal effects.
Lodging and travel (excluding meals):
Lodging and travel (excluding automobile).
Parking fees and tolls.
Gas and oil.
Miles driven to new home (1/1/11 - 6/30/11)
Miles driven to new home (7/1/11 - 12/31/11).

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

17, 27

2011	1040	US	Rental & Royalty Income (Schedule E)	No. <input style="width:40px;" type="text"/>	18
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Please enter all pertinent 2011 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Description of property	<input style="width:95%;" type="text"/>
Street address	<input style="width:95%;" type="text"/>
City	<input style="width:95%;" type="text"/>
State	<input style="width:95%;" type="text"/>
ZIP code	<input style="width:95%;" type="text"/>
Type of property (see table)	<input style="width:95%;" type="text"/>
Other type of property	<input style="width:95%;" type="text"/>

Percentage of ownership if not 100% (.xxxx)	<input style="width:40%;" type="text"/>	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
Percentage of tenant occupancy if not 100% (.xxxx)	<input style="width:40%;" type="text"/>	
1=spouse, 2=joint	<input style="width:40%;" type="text"/>	
1=qualified joint venture	<input style="width:40%;" type="text"/>	
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no	<input style="width:40%;" type="text"/>	
1=nonpassive activity, 2=passive royalty	<input style="width:40%;" type="text"/>	
1=did not actively participate	<input style="width:40%;" type="text"/>	
1=real estate professional	<input style="width:40%;" type="text"/>	
1=rental other than real estate	<input style="width:40%;" type="text"/>	
1=investment	<input style="width:40%;" type="text"/>	
1=single member limited liability company	<input style="width:40%;" type="text"/>	

INCOME

	2011 Amount	2010 Amount
Merchant card and third party payments (Form 1099-K, Box 1) *	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Payments not reported above	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Adjustments to amounts from Form(s) 1099-K *	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>

DIRECT EXPENSES

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

Advertising	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Association dues	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Auto and travel (not entered elsewhere)	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Cleaning and maintenance	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Commissions	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Gardening	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Insurance	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Legal and professional fees	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Licenses and permits	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Management fees	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Miscellaneous	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Mortgage interest (paid to banks, etc.)	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Qualified mortgage insurance premiums	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Excess mortgage interest	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Other interest (not entered elsewhere)	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
Painting and decorating	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>

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

* NOTE: Based on late revisions to the 2011 Schedules E, Merchant card and third party payments from Form 1099-K, Box 1 will not be reported separately (for 2011 only).

Please enter all pertinent 2011 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.

	2011 Amount	2010 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 rented at fair market value.....		
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.....		

2011

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US

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

No.

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Please enter all pertinent 2011 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.

	2011 Amount	2010 Amount
Pest control.....		
Plumbing and electrical.....		
Repairs.....		
Supplies.....		
Taxes - real estate.....		
Taxes - other (not entered elsewhere).....		
Telephone.....		
Utilities.....		
Wages and salaries.....		
Other:		

2011	1040	US	Farm Income (Schedule F/Form 4835)	No. <input style="width:40px;" type="text"/>	19
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Please enter all pertinent 2011 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Principal product.....

Employer ID number.....

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

FARM INCOME

	2011 Amount	2010 Amount
Cash method:		
Specified sales of livestock and other resale items (1099-K, Box 1) *.....		
Sales of livestock and other resale items not included above.....		
Cost or basis of livestock or other resale items.....		
Specified sales of products raised (1099-K, Box 1) *.....		
Sales of products raised not included above.....		
Accrual method:		
Specified sales of livestock, produce, etc. (1099-K, Box 1) *.....		
Sales of livestock, produce, etc. not included above.....		
Beginning inventory of livestock, etc.....		
Cost of livestock, etc. purchased.....		
Ending inventory of livestock, etc.....		
Other farm income:		
Total cooperative distributions.....		
Taxable cooperative distributions.....		
Total agricultural program payments (other than CRP).....		
Taxable agricultural program payments (other than CRP).....		
Total conservation reserve program payments.....		
Taxable conservation reserve program payments.....		
Commodity credit loans reported under election.....		
Total commodity credit loans forfeited or repaid.....		
Taxable commodity credit loans forfeited or repaid.....		
Total crop insurance proceeds received in 2011.....		
Taxable crop insurance proceeds received in 2011.....		
Taxable crop insurance proceeds deferred from 2010.....		
Specified custom hire (machine work) income (1099-K, Box 1) *.....		
Custom hire (machine work) income not included above.....		
Adjustments to amounts from Form(s) 1099-K *.....		

* NOTE: Based on late revisions to the 2011 Schedules F, income from Form 1099-K, Box 1 will not be reported separately (for 2011 only).

2011	1040	US	Partnership and S corporation Information	20.1,20.2
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Please add, change or delete 2011 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

2011	1040	US	Estate or Trust and REMIC Information	20.3,20.4
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Please add, change or delete 2011 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

REMIC INFORMATION (20.4)

No.	Name of REMIC	Employer Identification Number

20.3,20.4

2011	1040	US	Vehicle Expenses	No. <input style="width:40px;" type="text"/>	22 p3
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Please enter all pertinent 2011 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

	2011 Amount	2010 Amount
Description of vehicle.....		
1=no evidence to support your deduction.....		
1=no written evidence to support your deduction.....		
1=vehicle is available for off-duty personal use.....		
1=no other vehicle is available for personal use.....		
1=vehicle used primarily by more than 5% owner.....		
Number of months your job required a vehicle (if not 12 months).....		

AUTOMOBILE MILEAGE

Total mileage (for the tax year).....		
Business mileage (from 1/1/11 to 6/30/11).....		
Business mileage (from 7/1/11 to 12/31/11).....		
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).....		

Please enter all pertinent 2011 information. Last year's amounts are provided for your reference.

TRADITIONAL IRA CONTRIBUTIONS

	2011 Amount		2010 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
IRA contributions you made or expect to make (1=maximum) (\$5,000/\$6,000 if 50 or older)				
Contributions made to date				
1=covered by plan, 2=not covered				
2011 payments from 1/1/12 to 4/17/12				

ROTH IRA CONTRIBUTIONS

	2011 Amount	2010 Amount
	Taxpayer	Spouse
Roth IRA contributions you made or expect to make (1=maximum) (\$5,000/\$6,000 if 50 or older)		
Contributions made to date		

SEP, SIMPLE AND QUALIFIED PLANS (KEOGH)

	2011 Amount		2010 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Profit-sharing (25%/1.25) contributions you made or expect to make (1=maximum)				
Money purchase (25%/1.25) contributions you made or expect to make (1=maximum)				
Defined benefit contributions you expect to make				
Self-employed SEP (25%/1.25) contributions you made or expect to make (1=maximum)				
Plan contribution rate if not .25 (.xxxx)				
Individual 401k: SE elective deferrals (except Roth) (1=max.)				
Individual 401k: SE designated Roth contributions (1=max.)				
SIMPLE contributions:				
Self-employed SIMPLE contributions you made or expect to make (1=maximum)				
Employer matching rate if not .03 (.xxxx)				
1=nonelective contributions (2%)				
Contributions made to date				

ADJUSTMENTS TO INCOME

	2011 Amount		2010 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Self-employed health insurance:				
Total premiums (excluding long-term care)				
Long-term care premiums				
Student loan interest paid (1098-E, box 1)				
Educator expenses (kindergarten thru grade 12)				
Jury duty pay given to employer				
Expenses from rental of personal property				
Other adjustments to income:				

	2011 Amount		2010 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Alimony paid:				
Recipient's first name				
Recipient's last name				
Recipient's SSN				
Amount paid	2011 amt:	2010 amt:	2010 amt:	2010 amt:

Please enter all pertinent 2011 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.

	2011 Amount	rs	2010 Amount
Prescription medicines and drugs			
Doctors, dentists and nurses			
Hospitals and nursing homes			
Insurance premiums not entered elsewhere (excl. 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 (1/1/11 - 6/30/11)			
Medical miles driven (7/1/11 - 12/31/11)			
Other medical and dental expenses:			

TAXES PAID (State and local withholding and 2011 estimates are automatic.)

State income taxes - 1/11 payment on 2010 state estimate			
State income taxes - paid with 2010 state extension			
State income taxes - paid with 2010 state return			
State income taxes - paid for prior years and/or to other state			
City/local income taxes - 1/11 payment on 2010 city/local estimate			
City/local income taxes - paid with 2010 city/local extension			
City/local income taxes - paid with 2010 city/local return			

SALES AND USE TAXES PAID

State and local sales taxes (except autos and special items)			
Use taxes paid on 2011 purchases			
Use taxes paid with 2010 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:			

2011

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US

Itemized Deductions (continued)

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Please enter all pertinent 2011 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:

2011 Amount

TS

2010 Amount

Table with 3 columns: 2011 Amount, TS, 2010 Amount. Includes rows for home mortgage interest and points.

Home mortgage interest not reported on Form 1098:

Form for home mortgage interest not reported on Form 1098, including fields for payee's name, SSN, address, and amount paid.

Points not reported on Form 1098:

Table with 3 columns: 2011 Amount, TS, 2010 Amount for points not reported on Form 1098.

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

Table with 3 columns: 2011 Amount, TS, 2010 Amount for mortgage insurance premiums.

Investment interest (interest on margin accounts):

Table with 3 columns: 2011 Amount, TS, 2010 Amount for investment interest.

Passive interest

Table with 3 columns: 2011 Amount, TS, 2010 Amount for passive interest.

Certain home mortgage interest included above (6251)

Table with 3 columns: 2011 Amount, TS, 2010 Amount for certain home mortgage interest.

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:

Table with 3 columns: 2011 Amount, TS, 2010 Amount for cash or check contributions to churches, schools, hospitals, etc.

Volunteer expenses (out-of-pocket)

Number of charitable miles

Table with 3 columns: 2011 Amount, TS, 2010 Amount for volunteer expenses and miles.

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

Contributions by cash or check:

Table with 3 columns: 2011 Amount, TS, 2010 Amount for cash or check contributions to veterans' organizations, etc.

Volunteer expenses (out-of-pocket)

Number of charitable miles

Table with 3 columns: 2011 Amount, TS, 2010 Amount for volunteer expenses and miles.

2011

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US

Itemized Deductions (continued)

25 p3

Please enter all pertinent 2011 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):

2011 Amount	Ts	2010 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.....

--	--	--

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):

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 2011 (\$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 2011 (\$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 2011 amounts and attach all 1098 forms.
Last year's amounts are provided for your reference.**

	2011 Amount	TS	2010 Amount
Fair market value of the property on the date that the last debt was secured			
Home acquisition and grandfather debt on the date that the last debt was secured			

LOAN INFORMATION

Loan #1

Lender's name			
Form (see table)			
Number of form			
1=taxpayer, 2=spouse, blank=joint			
Interest paid			
Points paid			
Total principal paid			
Lump sum principal payment (if paid off)			
Months outstanding (if not 12)			
Home acquisition debt balance - beginning of year			
Home acquisition debt borrowed in 2011			
Home equity debt balance - beginning of year			
Home equity debt borrowed in 2011			
Grandfather debt balance - beginning of year			

Loan #2

Lender's name			
Form (see table)			
Number of form			
1=taxpayer, 2=spouse, blank=joint			
Interest paid			
Points paid			
Total principal paid			
Lump sum principal payment (if paid off)			
Months outstanding (if not 12)			
Home acquisition debt balance - beginning of year			
Home acquisition debt borrowed in 2011			
Home equity debt balance - beginning of year			
Home equity debt borrowed in 2011			
Grandfather debt balance - beginning of year			

<p>Form</p> <p>1 = Schedule A (default) 2 = Business use of home 3 = Schedule E</p>
--

2011

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US

Employee/Vehicle Bus. Exp. (Form 2106)

No.

30

Please enter all pertinent 2011 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Occupation, if different from Form 1040.....

Form.....

Number of form (1=first Schedule C, 2=second, etc.).....

1=spouse.....

1=performance artist, 2=handicapped, 3=fee-basis government official.....

EMPLOYEE BUSINESS EXPENSES

	2011 Amount	2010 Amount
Meal and entertainment expenses.....	<input type="text"/>	<input type="text"/>
Reimbursements for meals and entertainment not on W-2, box 1.....	<input type="text"/>	<input type="text"/>
1=Department of Transportation (80% meal allowance).....	<input type="text"/>	<input type="text"/>
Local transportation (bus, taxi, train, etc.).....	<input type="text"/>	<input type="text"/>
Travel expenses while away from home overnight.....	<input type="text"/>	<input type="text"/>
Reimbursements not included on Form W-2, box 1.....	<input type="text"/>	<input type="text"/>
Other business expenses:		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

30

2011

1040

US

Vehicle Expenses (Form 2106) (cont.)

No.

30 p2

Please enter all pertinent 2011 amounts. Last year's amounts are provided for your reference.

VEHICLE INFORMATION

- 1=vehicle used primarily by more than 5% owner.....
- 1=vehicle is available for off-duty personal use.....
- 1=no other vehicle is available for personal use.....
- 1=no evidence to support your deduction.....
- 1=no written evidence to support your deduction.....

2011 Amount	2010 Amount

VEHICLE 1

- Description of vehicle.....
- Date placed in service (m/d/y).....
- Total mileage (for the tax year).....
- Business mileage (from 1/1/11 to 6/30/11).....
- Business mileage (from 7/1/11 to 12/31/11).....
- Commuting mileage (for the tax year).....
- Average daily round-trip commute.....
- Number of months of vehicle business use (if not 12).....
- Parking fees and tolls (business portion only).....

Actual expenses:

- 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).....

VEHICLE 2

- Description of vehicle.....
- Date placed in service (m/d/y).....
- Total mileage (for the tax year).....
- Business mileage (from 1/1/11 to 6/30/11).....
- Business mileage (from 7/1/11 to 12/31/11).....
- Commuting mileage (for the tax year).....
- Average daily round-trip commute.....
- Number of months of vehicle business use (if not 12).....
- Parking fees and tolls (business portion only).....

Actual expenses:

- 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 and F).....
- Vehicle rent or lease payments.....
- Inclusion amount (enter as positive).....
- Value of employer-provided vehicle on Form W-2 (2106).....

30 p2

2011

1040

US

Foreign Income Exclusion (Form 2555)

No.

31.1

Please enter all pertinent 2011 information.

GENERAL INFORMATION

1=spouse

Foreign address of taxpayer, if different from Form 1040:

Street address
City
Region
Postal code
Country

Employer:

Name
U.S. street address
U.S. city
U.S. state
U.S. ZIP code
Foreign street address
Foreign city
Foreign region
Foreign postal code
Foreign country
Employer type: 1=foreign entity, 2=U.S. company, 3=self, 4=foreign affiliate of U.S. company, 5=other
Employer type, if other

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

Country of citizenship

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)

Tax homes(s) during tax year:
Dates tax home(s) were established (m/d/yy)

31.1

2011	1040	US	Foreign Income Exclusion (2555)	No. <input style="width:40px;" type="text"/>	31.1 p2
-------------	-------------	-----------	--	--	----------------

Please enter all pertinent 2011 information.

TRAVEL INFORMATION

NOTE: Please enter all travel for 2011 as well as travel for 2012 known to date.

Travel Type (table)	Name of country (if not United States)	Date arrived	Date left	Days in U.S. on business

BONA FIDE RESIDENCE TEST AND PHYSICAL PRESENCE TEST

Beginning date for bona fide residence (m/d/y).....	<input style="width:90%;" type="text"/>	
Ending date for bona fide residence (m/d/y).....	<input style="width:90%;" type="text"/>	
Living quarters in foreign country: 1=purchased home, 2=rented house or apartment, 3=rented room, 4=quarters furnished by employer.	<input style="width:90%;" type="text"/>	

Names of family living abroad with taxpayer (if applicable):	Period family lived abroad
<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>

1=submitted statement to country of bona fide residence.	<input style="width:90%;" type="text"/>	
1=required to pay income tax to country of bona fide residence.	<input style="width:90%;" type="text"/>	
Contractual terms relating to length of employment abroad.	<input style="width:90%;" type="text"/>	
Type of visa you entered foreign country under.	<input style="width:90%;" type="text"/>	
Explanation why visa limited stay or employment in country (if applicable).....	<input style="width:90%;" type="text"/>	

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)
<input style="width:95%;" type="text"/>	<input style="width:90%;" type="text"/>	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>
<input style="width:95%;" type="text"/>	<input style="width:90%;" type="text"/>	<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>

Principal country of employment

FOREIGN HOUSING EXPENSES

	2011 Amount	2010 Amount
Qualified housing expenses.....	<input style="width:90%;" type="text"/>	<input style="width:90%;" type="text"/>
Location of housing expenses:	Qualifying days in location (multiple locations only)	
<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>	
<input style="width:95%;" type="text"/>	<input style="width:95%;" type="text"/>	

Travel Type

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

2011	1040	US	Foreign Income Exclusion (Form 2555)	No. <input style="width:40px;" type="text"/>	31.2
-------------	-------------	-----------	---	--	-------------

Please enter all pertinent 2011 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

	2011 Amount	2010 Amount
Name or number.....		
1=spouse.....		
1=retirement plan (Box 13).....		
Name of employer (Box c).....		
Wages, tips, other compensation (Box 1).....		
Federal income tax withheld (Box 2).....		
Social security tax withheld (Box 4).....		
Medicare tax withheld (Box 6).....		
State income tax withheld (Box 17).....		
Local income tax withheld (Box 19).....		

FOREIGN ALLOWANCES, REIMBURSEMENTS AND OTHER EARNED INCOME

Noncash Income

Home (lodging).....		
Meals.....		
Car.....		
Other properties or facilities:		

Allowances and Reimbursements

Cost of living and overseas differential.....		
Family.....		
Education.....		
Home leave.....		
Quarters.....		
Other purposes:		

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

Other Foreign Earned Income

2011 Days Worked Allocation Information

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

2011	1040	US	Health Savings Accounts (8889)	32.1
-------------	-------------	-----------	---------------------------------------	-------------

Please enter all pertinent 2011 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 2011, 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 \$5,950 for self-only coverage or \$11,900 for family coverage.

	2011 Amount		2010 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

2011 1040 US Child and Dependent Care Expenses (Form 2441) 33.1,33.2

Please enter all pertinent 2011 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)

	2011 Amount		2010 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Dependent care expenses incurred but not paid in 2011....				
Employer-provided benefits forfeited in 2011				

PERSONS AND EXPENSES QUALIFYING FOR DEPENDENT CARE CREDIT

No. <input type="text"/>	First name.....	
	Last name.....	
	Date of birth (m/d/y).....	
	Social security number.....	
	Qualified dependent care expenses incurred and paid in 2011.....	2010 amt:
	1=disabled..... 1=spouse, 2=joint.....	

No. <input type="text"/>	First name.....	
	Last name.....	
	Date of birth (m/d/y).....	
	Social security number.....	
	Qualified dependent care expenses incurred and paid in 2011.....	2010 amt:
	1=disabled..... 1=spouse, 2=joint.....	

No. <input type="text"/>	First name.....	
	Last name.....	
	Date of birth (m/d/y).....	
	Social security number.....	
	Qualified dependent care expenses incurred and paid in 2011.....	2010 amt:
	1=disabled..... 1=spouse, 2=joint.....	

PERSONS OR ORGANIZATIONS PROVIDING CARE (33.2)

No. <input type="text"/>	Name of provider.....	
	Street address.....	
	City, state, ZIP code.....	
	Identification number (SSN or EIN).....	
	Amount paid to care provider in 2011.....	2010 amt:
	1=spouse, 2=joint.....	

No. <input type="text"/>	Name of provider.....	
	Street address.....	
	City, state, ZIP code.....	
	Identification number (SSN or EIN).....	
	Amount paid to care provider in 2011.....	2010 amt:
	1=spouse, 2=joint.....	

Please enter all pertinent 2011 information. Last year's amounts are provided for your reference.

ELIGIBLE CHILDREN

		2011 Amount	2010 Amount																
No. <input style="width: 40px;" type="text"/>	First name.....																		
	Last name.....																		
	Identification number.....																		
	Date of birth (m/d/y).....																		
	1=born before 1994 and was disabled.....																		
	1=special needs child.....																		
	1=foreign child.....																		
	1=adoption was not final in 2011.....																		
	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:15%; padding: 2px;">Qualified Adoption Expenses Paid in</td> <td style="padding: 2px;">2010 for adoption not finalized by end of 2011.....</td> <td style="width:15%;"></td> <td style="width:15%;"></td> </tr> <tr> <td></td> <td style="padding: 2px;">Prior years for adoption of foreign child finalized in 2011.....</td> <td></td> <td></td> </tr> <tr> <td></td> <td style="padding: 2px;">2010 and 2011 for adoption finalized in 2011.....</td> <td></td> <td></td> </tr> <tr> <td></td> <td style="padding: 2px;">2011 for adoption finalized before 2011.....</td> <td></td> <td></td> </tr> </table>	Qualified Adoption Expenses Paid in	2010 for adoption not finalized by end of 2011.....				Prior years for adoption of foreign child finalized in 2011.....				2010 and 2011 for adoption finalized in 2011.....				2011 for adoption finalized before 2011.....				
	Qualified Adoption Expenses Paid in	2010 for adoption not finalized by end of 2011.....																	
	Prior years for adoption of foreign child finalized in 2011.....																		
	2010 and 2011 for adoption finalized in 2011.....																		
	2011 for adoption finalized before 2011.....																		
1=spouse, 2=joint.....																			
No. <input style="width: 40px;" type="text"/>	First name.....																		
	Last name.....																		
	Identification number.....																		
	Date of birth (m/d/y).....																		
	1=born before 1994 and was disabled.....																		
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	Qualified Adoption Expenses Paid in	2010 for adoption not finalized by end of 2011.....																	
	Prior years for adoption of foreign child finalized in 2011.....																		
	2010 and 2011 for adoption finalized in 2011.....																		
	2011 for adoption finalized before 2011.....																		
1=spouse, 2=joint.....																			
No. <input style="width: 40px;" type="text"/>	First name.....																		
	Last name.....																		
	Identification number.....																		
	Date of birth (m/d/y).....																		
	1=born before 1994 and was disabled.....																		
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	1=foreign child.....																		
	1=adoption was not final in 2011.....																		
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	Qualified Adoption Expenses Paid in	2010 for adoption not finalized by end of 2011.....																	
	Prior years for adoption of foreign child finalized in 2011.....																		
	2010 and 2011 for adoption finalized in 2011.....																		
	2011 for adoption finalized before 2011.....																		
1=spouse, 2=joint.....																			

Please complete the information below if you paid qualified education expenses in 2011 for you, your spouse, or your dependents enrolled in an accredited postsecondary institution.
Last year's amounts are provided for your reference.

PERSONS AND EXPENSES QUALIFYING FOR EDUCATION CREDITS OR TUITION DED.

		2011 Amount	2010 Amount	
No. <input style="width: 40px;" type="text"/>	Student Info.	1=taxpayer, 2=spouse		
		First name		
		Last name		
		Social security number		
	1=American opportunity credit, 2=lifetime learning credit			
	Number of years hope credit claimed			
	Number of years American opportunity credit claimed			
	Student completed 1st 4 years of post-secondary edu. before 2011: 1=yes, 2=no			
	Qualified tuition and fees paid in 2011 (net of refund or assistance and not entered elsewhere)			
	Books and supplies required to be purchased from institution ...			
Books and supplies not entered above				
Amount of prior year refund or assistance *				

No. <input style="width: 40px;" type="text"/>	Student Info.	1=taxpayer, 2=spouse		
		First name		
		Last name		
		Social security number		
	1=American opportunity credit, 2=lifetime learning credit			
	Number of years hope credit claimed			
	Number of years American opportunity credit claimed			
	Student completed 1st 4 years of post-secondary edu. before 2011: 1=yes, 2=no			
	Qualified tuition and fees paid in 2011 (net of refund or assistance and not entered elsewhere)			
	Books and supplies required to be purchased from institution ...			
Books and supplies not entered above				
Amount of prior year refund or assistance *				

No. <input style="width: 40px;" type="text"/>	Student Info.	1=taxpayer, 2=spouse		
		First name		
		Last name		
		Social security number		
	1=American opportunity credit, 2=lifetime learning credit			
	Number of years hope credit claimed			
	Number of years American opportunity credit claimed			
	Student completed 1st 4 years of post-secondary edu. before 2011: 1=yes, 2=no			
	Qualified tuition and fees paid in 2011 (net of refund or assistance and not entered elsewhere)			
	Books and supplies required to be purchased from institution ...			
Books and 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.

Please enter all pertinent 2011 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 2011; withheld federal income tax during 2011 for any household employee; or paid total cash wages of \$1,000 or more in any calendar quarter of 2009 or 2011 to household employees, please complete the following:

Employer identification number	
1=spouse, 2=joint	

	2011 Amount	2010 Amount
Social security, Medicare and income taxes:		
1=paid any one employee cash wages of \$1,700 or more		
1=withheld federal income tax for household employee		
Total cash wages subject to social security taxes		
Total cash wages subject to Medicare taxes		
Federal income tax withheld		
Advance earned income credit payments		
Taxes withheld from state disability payments		

Federal unemployment tax:		
1=paid total cash wages of \$1,000 or more in any calendar quarter of 2010 or 2011		
Total cash wages subject to FUTA tax		
1=paid unemployment contributions to only one state		
1=paid all state unemployment contributions by 4/15/12		
1=all wages taxable for FUTA were also taxable for state unemployment		
Name of state		
Contributions paid to state unemployment fund		

2011

1040

US

Parent's Election to Report Child's Inc.

No.

44

Please enter all pertinent 2011 amounts & attach all 1099-INT and 1099-DIV forms.
Last year's amounts are provided for your reference.

CHILD'S INFORMATION

First name.....	
Last name.....	
Social security number.....	
Date of birth (m/d/y).....	
1=nontaxable to federal.....	
1=nontaxable to state.....	

INTEREST INCOME (Form 1099-INT)

	2011 Amount	2010 Amount
Banks, credit unions, etc. (Box 1): _____		
U.S. bonds, T-bills, etc. (nontaxable to state) (Box 3): _____		
Tax-exempt interest:		
Total municipal bonds.....		
In-state municipal bonds.....		
Adjustments:		
Nominee distribution.....		
Accrued interest.....		
Tax-exempt interest (1099-INT in error).....		
OID adjustment.....		
ABP adjustment.....		
Foreign:		
1=interest in or authority over foreign account.....		
Name of foreign country.....		
1=grantor/transferor or received distribution from foreign trust.....		
Post 8/7/86 private activity bond interest (included above) (6251).....		

DIVIDEND INCOME (Form 1099-DIV)

Total ordinary dividends (Box 1a): _____		
Qualified dividends (Box 1b).....		
Total capital gain distributions (Box 2a): _____		
Unrecaptured section 1250 gain (Box 2b).....		
Section 1202 gain (Box 2c).....		
Collectibles (28%) gain (Box 2d).....		
Nontaxable distributions (Box 3).....		
Tax-exempt interest:		
Total municipal bonds.....		
In-state municipal bonds.....		
Nominee distributions:		
Ordinary dividends.....		
Qualified dividends.....		
Capital gain distributions.....		
Alaska permanent fund dividends included above.....		

2011

1040

MA

Rental Deduction Information

51.191

Please enter all pertinent 2011 amounts.

No. <input type="text"/>	Landlord Information	Name	
		Street	
		City, state, ZIP code	
Occupancy Information	Rents paid in 2011		
	Date occupied		
	Date vacated		

No. <input type="text"/>	Landlord Information	Name	
		Street	
		City, state, ZIP code	
Occupancy Information	Rents paid in 2011		
	Date occupied		
	Date vacated		

No. <input type="text"/>	Landlord Information	Name	
		Street	
		City, state, ZIP code	
Occupancy Information	Rents paid in 2011		
	Date occupied		
	Date vacated		

No. <input type="text"/>	Landlord Information	Name	
		Street	
		City, state, ZIP code	
Occupancy Information	Rents paid in 2011		
	Date occupied		
	Date vacated		

No. <input type="text"/>	Landlord Information	Name	
		Street	
		City, state, ZIP code	
Occupancy Information	Rents paid in 2011		
	Date occupied		
	Date vacated		

No. <input type="text"/>	Landlord Information	Name	
		Street	
		City, state, ZIP code	
Occupancy Information	Rents paid in 2011		
	Date occupied		
	Date vacated		

No. <input type="text"/>	Landlord Information	Name	
		Street	
		City, state, ZIP code	
Occupancy Information	Rents paid in 2011		
	Date occupied		
	Date vacated		

51.191

**Massachusetts residents (ages 18 and older) should enter all pertinent information below.
Also provide MA Form 1099-HC.**

HEALTH INSURANCE INFORMATION

No. <input style="width:40px;" type="text"/>	Private health insurance: 1=spouse, 2=joint (leave blank if taxpayer)..... Name of insurance company (MA 1099-HC, box 1)..... FID number of insurance company (MA 1099-HC, box 2) ... Subscriber number (MA 1099-HC, box 5).....		
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No. <input style="width:40px;" type="text"/>	Private health insurance: 1=spouse, 2=joint (leave blank if taxpayer)..... Name of insurance company (MA 1099-HC, box 1)..... FID number of insurance company (MA 1099-HC, box 2) ... Subscriber number (MA 1099-HC, box 5).....		
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No. <input style="width:40px;" type="text"/>	Private health insurance: 1=spouse, 2=joint (leave blank if taxpayer)..... Name of insurance company (MA 1099-HC, box 1)..... FID number of insurance company (MA 1099-HC, box 2) ... Subscriber number (MA 1099-HC, box 5).....		
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NOTE: Enter "1" in the box below if ALL of the following apply: 1) Insured for all 2011; 2) Resident of Massachusetts for all of 2011; 3) 18 years or older as of January 1, 2011.

	Taxpayer	Spouse
1=you were insured for all of 2011.....	<input style="width:40px;" type="text"/>	<input style="width:40px;" type="text"/>

NOTE: For the Taxpayer (or Spouse) that was NOT insured for all of 2011. Enter "1" below for each month covered by health insurance. Leave blank if "1" was entered above.

Months covered by health insurance (if not full year):	Taxpayer	Spouse
1=January.....		
1=February.....		
1=March.....		
1=April.....		
1=May.....		
1=June.....		
1=July.....		
1=August.....		
1=September.....		
1=October.....		
1=November.....		
1=December.....		

NOTE: If you or your spouse had government-subsidized health insurance, fill out the appropriate information below.

Government subsidized health insurance:	Taxpayer	Spouse
1=Commonwealth care.....		
1=Commonwealth care bridge.....		
1=MassHealth.....		
1=Medicare.....		
1=U.S. military.....		
1=Tri-care.....		
1=VA Program enrollment.....		
Name of other provider - taxpayer.....		
Name of other provider - spouse.....		

