

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2010 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2010 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2009 information is included for your reference. You do not need to make any 2009 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- A copy of your 2009 tax return (if not in our possession).
- Original Form(s) W-2.
- Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- Copies of other compensation or pension documentation, such as Form 1099-MISC or Form 1099-R.
- Form(s) 1099 or statements reporting dividend and interest income.
- Brokerage statements showing transactions for stocks, bonds, etc.
- Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

**Hendershot, Burkhardt & Reed, CPAs**  
7525 Presidential Lane  
Manassas, VA 20109  
Telephone: (703) 361-1592 Fax: (703) 361-0836  
E-mail: info@hbrcpas.com

**ENGAGEMENT LETTER BETWEEN CLIENT AND  
HENDERSHOT, BURKHARDT, & REED, CPAs**

This confirms our arrangements with you for income tax preparation service. The scope of our engagement is to only prepare your 2010 federal and state income tax returns. Our preparation will be from the information you provide. Our work will be performed in accordance with the Statements on Responsibilities in Tax Practice as promulgated by the American Institute of Certified Public Accountants. This letter will serve to document our discussions regarding the scope of the engagement and contains the entire understanding of the parties regarding the work to be performed. Our work will not guarantee detection of fraud or theft, and does not include business consulting or tax planning services. However, you may contract these services separately.

We will not conduct an audit or financial review of the data you submit to us even though we may ask you to clarify or send us additional documents. In order to avoid ambiguity and insure clarity, we request that any tax research questions be submitted in writing. We will provide a written response. You certify, by your signature, that you have disclosed all items of income and you have written records to support all deductible items, and that you have included or reviewed all income and deductible items on your organizer for completeness and accuracy.

You understand you have the final responsibility for your tax return. You should review your tax returns carefully before you sign and mail them. We welcome any questions you may have in connection with these terms.

**Tax returns will be delivered upon payment.** For your added convenience, we accept all major credit cards. If you supply additional information after the tax return is completed, an additional charge will be levied to recompile your return.

All tax returns are subject to review by the taxing authorities. We suggest that you notify us immediately if you receive any inquiry or communication concerning your tax returns so that we may advise you as to what course of action you should follow. If IRS or the State selects your return for audit, we can either advise you or represent you before the taxing authorities. Fees for requested level of representation are billed separately and are not related to the fees charged to prepare your tax return. We are available to help you during the year with other proposed financial transactions and tax planning at our normal professional rates.

In accordance with our company's current document retention policy, we will retain copies of the records we deem to be pertinent that you have supplied us along with our work papers for your engagement for a period of three years. All of your original records will be returned to you. After three years, our work papers and files will no longer be available. Physical deterioration or catastrophic events may shorten the time during which our records will be available. The working papers and files of our company are not a substitute for the original records, and you should not rely upon our records. A \$25.00 fee will be charged for each copy of a prior year return requested; requests must be made in writing and may take two to three days to process.

We may receive requests for information arising out of this engagement. The requests may come from governmental agencies, courts or other tribunals as well as from other sources. In certain situations, an accountant-client privilege may exist. You agree that we are not under any obligation to protect the release of information unless the accountant-client privilege does in fact exist. Unless we have been legally notified not to release information or the accountant-client privilege exists, we will release the information requested. Please read the privacy statement located on the reverse side.

I have read and accept the above contract for engagement.

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Client's Signature

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Date

**Hendershot, Burkhardt & Reed, CPAs**  
**7525 Presidential Lane, Manassas, VA 20109**

**Notice of Privacy Practices**

*To our clients:* This notice describes how accounting information about you (as a client of this firm) may be used and disclosed, and how you can get access to your accounting information.

**Our commitment to your privacy**

Our firm is dedicated to maintaining the privacy of your accounting information. We are required by law to maintain the confidentiality of your accounting information.

We realize that these laws are complicated, but we must provide you with the following information:

**Use and disclosure of your accounting information in certain special circumstances**

The following circumstances may require us to use or disclose your accounting information:

1. To the Internal Revenue Service.
2. Lawsuits and similar proceedings in response to a court of administrative order.
3. If required to do so by a law enforcement official.
4. If you are a member of U.S. or foreign military forces (including veterans) and if required by the appropriate authorities.
5. To federal officials for intelligence and national security activities authorized by law.
6. To correctional institutions or law enforcement officials if you are an inmate or under the custody of a law enforcement official.

**Your rights regarding your accounting information**

1. Communications. You can request that our practice communicate with you about your accounting and financial related issues in a particular manner or at a certain location. For instance, you may ask that we contact you at home, rather than at work. We will accommodate reasonable requests.
2. You may ask to amend your tax information if you believe it is incorrect or incomplete, and as long as the information is kept by or for our firm. To request an amendment, your request must be made in writing and submitted to Hendershot, Burkhardt & Reed, CPAs. For further information please call Martha Kimble or Dave Burkhardt at 703-361-1592. You must provide us with a reason that supports your request for amendment.
3. Right to a copy of this notice. You are entitled to receive a copy of this Notice of Privacy Practices. You may ask us to give you a copy of this Notice at any time. To obtain a copy of this notice, contact our front desk receptionist.
4. Right to file a complaint. If you believe your privacy rights have been violated, you may file a complaint with our practice. To file a complaint with our firm, contact Richard L. Hendershot, CPA. For further information contact Martha Kimble at 703-361-1592. All complaints must be submitted in writing.
5. Right to provide an authorization for other uses and disclosures. Our practice will obtain your written authorization for use and disclosures that are not identified by this notice or permitted by applicable law.

If you have any questions regarding this notice or our accounting information privacy policies, please contact Richard L. Hendershot, CPA.

## 2010 Tax Documents to Send to Preparer

▶  Check items enclosed.

Gather the following documents to send to your preparer.

Form 1099-INT - Interest Income:

Form 1099-B - Brokerage Statements:

# Table of Contents

ORG1

Description	Page
Cover Sheet .....	ORG0
Topic Index .....	ORG2
General Questions .....	ORG3
Business/Investment Questions .....	ORG4
Additional Information .....	ORG5
Basic Taxpayer Information .....	ORG6
W-2, W-2G, 1099-R Income .....	ORG7
1099-MISC Income .....	ORG8
Social Security Benefits/Form 1099-G/Other Income .....	ORG10
Interest and Dividend Income .....	ORG11
Seller Financed Interest/Child's Interest and Dividends .....	ORG12
Medical and Tax Expenses .....	ORG13
Interest Paid and Cash Contributions .....	ORG14
Non-Cash Charitable Contributions .....	ORG14A
Miscellaneous Itemized Deductions .....	ORG15
Moving Expenses .....	ORG16
Employee Business Expenses .....	ORG17
Employee Home Office Expense .....	ORG17A
Car and Truck Expenses .....	ORG18
Business Income and Expenses .....	ORG19
Business Use of Home .....	ORG20
Sales of Stocks and Securities .....	ORG21
Sale of Your Home .....	ORG22
Installment Sales Income .....	ORG23
Sales of Business Property .....	ORG24
Rental and Royalty Income and Expenses .....	ORG25
Farm Rental Income and Expenses .....	ORG26
Farm Income and Expenses .....	ORG27
Adjustments to Income .....	ORG28
Dependent Care Expenses .....	ORG35
Education .....	ORG36
Tax Payments .....	ORG40
Household Employment Taxes .....	ORG41
K-1 Partnership – Partner's Questions .....	ORG45
K-1 S-Corporation – Shareholder's Questions .....	ORG46
K-1 Estate & Trust – Beneficiary's Questions .....	ORG47
K-1 Partnership Supplemental Business Expense .....	ORG48
Transferred Assets .....	ORG50
Additional Assets .....	ORG51
State Information Worksheet .....	ORG60

## Topic Index

ORG2

Alimony paid .....	ORG28	Keogh plan contributions .....	ORG28
Alimony received .....	ORG10	Medical and dental expenses .....	ORG13
Annuity payments received .....	ORG7	Miscellaneous income reported on 1099-MISC .....	ORG8
Business income and expenses .....	ORG19	Miscellaneous income not from 1099-MISC .....	ORG10
Car and truck expenses .....	ORG18	Miscellaneous itemized deductions .....	ORG15
Casualties and thefts .....	ORG3	Moving expenses .....	ORG16
Charitable contributions .....	ORG14	Office in home expenses .....	ORG20
Child and dependent care expenses .....	ORG35	Partnership income .....	ORG45
Dependent information .....	ORG6	Pension payments received .....	ORG7
Depreciable property – additions .....	ORG51	Personal information .....	ORG6
Depreciable property – deletions .....	ORG50	Railroad retirement benefits .....	ORG10
Dividend income .....	ORG11	Rental income and expenses .....	ORG25
Education .....	ORG36	Royalty income and expenses .....	ORG25
Employee business expense .....	ORG17	S corporation income .....	ORG46
Estate income .....	ORG47	Sale of home .....	ORG22
Estimated and other tax payments .....	ORG40	Sales of business property .....	ORG24
Farm income and expenses .....	ORG27	Sales of stock, securities .....	ORG21
Farm rental income and expenses .....	ORG26	Self-employed health insurance .....	ORG19
Gambling and lottery winnings .....	ORG7	SEP plan contributions .....	ORG28
Household employees .....	ORG41	SIMPLE plan contributions .....	ORG28
Installment sales .....	ORG23	Social security benefits .....	ORG10
Interest income .....	ORG11	State and local tax refunds .....	ORG10
Interest paid (mortgage, etc) .....	ORG14	Taxes paid .....	ORG13
Investment interest expense .....	ORG14	Trust income .....	ORG47
IRA contributions .....	ORG28	Unemployment compensation .....	ORG10
IRA distributions and rollovers .....	ORG7	Wages and salaries .....	ORG7

# General Questions

ORG3

**PERSONAL INFORMATION**

	Yes	No
1 Did your marital status change during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , explain .....		
2 Do you want to allow your tax preparer to discuss this year's return with the IRS? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>no</b> , enter another person (if desired) to be allowed to discuss this return with the IRS. <b>Caution:</b> Review any transferred information for accuracy.		
Designee's Name .... ▶ _____		
Phone Number ..... ▶ _____ Personal Identification Number (5 digit PIN) .... ▶ _____		
3 Do you or your spouse plan to retire in 2011? .....	<input type="checkbox"/>	<input type="checkbox"/>
4 Were you or your spouse permanently and totally disabled in 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
5 Enter date of death for taxpayer or spouse (if during 2010 or 2011): Taxpayer: _____ Spouse: _____		
6 Were you or your spouse a member of the U.S. Armed Forces during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>

**DEPENDENT INFORMATION**

	Yes	No
7a Do you have dependents who must file? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If <b>yes</b> , do you want us to prepare the return(s)? .....	<input type="checkbox"/>	<input type="checkbox"/>
8a Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$1,900? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If <b>yes</b> , do you want to include your child's income on your return? .....	<input type="checkbox"/>	<input type="checkbox"/>
9 Are any of your dependents <b>not</b> U.S. citizens or residents? .....	<input type="checkbox"/>	<input type="checkbox"/>
10 Did you provide over half the support for any other person during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you incur adoption expenses during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>

**IRA, PENSION AND EDUCATION SAVINGS PLANS**

	Yes	No
12 Did you receive payments from a pension or profit-sharing plan? .....	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? .....	<input type="checkbox"/>	<input type="checkbox"/>
14a Did you convert all or part of a regular IRA into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
b Did you roll over all or part of a qualified plan into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you contribute to a Coverdell Education Savings Account? .....	<input type="checkbox"/>	<input type="checkbox"/>

**ITEMS RELATED TO INCOME/LOSSES**

	Yes	No
16 Did you receive any disability payments in 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you receive tip income <b>not</b> reported to your employer? .....	<input type="checkbox"/>	<input type="checkbox"/>
18a Did you buy, sell, refinance, or abandon a principal residence or other real property in 2010? (Attach copies of any escrow statements or Forms 1099.) .....	<input type="checkbox"/>	<input type="checkbox"/>
b Did you enter into a binding contract to purchase a new home by April 30, 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
c If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home? .....	<input type="checkbox"/>	<input type="checkbox"/>
d Are you planning to purchase a home soon? .....	<input type="checkbox"/>	<input type="checkbox"/>
19 Did you incur any casualty or theft losses during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
20 Did you incur any non-business bad debts? .....	<input type="checkbox"/>	<input type="checkbox"/>

**PRIOR YEAR TAX RETURNS**

	Yes	No
21 Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , enclose agent's report or notice of change.		
22 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return? .....	<input type="checkbox"/>	<input type="checkbox"/>

General Questions (continued)

ORG3

**FOREIGN BANK ACCOUNTS AND TAXES**

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| 23 Did you have foreign income or pay any foreign taxes in 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 24a At any time during the tax year, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
| b Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2010? Report all interest income on Org 11 .....                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| 25 Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust? .....             | <input type="checkbox"/> | <input type="checkbox"/> |

**HEALTH AND LIFE INSURANCE**

- |   | Yes                      | No                       |
|---|--------------------------|--------------------------|
| 26 Did you or your spouse have self-employed health insurance? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 27 If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job? .....      | <input type="checkbox"/> | <input type="checkbox"/> |
| 28 Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 29 Did you contribute to or receive distributions from a Health Savings Account (HSA)? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 30 Did you or your spouse elect continuation of COBRA coverage after your employment was involuntarily terminated? .....                      | <input type="checkbox"/> | <input type="checkbox"/> |

**MISCELLANEOUS**

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| 31 Did you receive an economic stimulus payment in 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| You may have received this payment in 2010 if you did not receive a payment in 2009 and you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits in November or December 2008, or January 2009. Report the amount here ..... |                          |                          |
| 32 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2010? If <b>yes</b> , please attach details .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 33 Did you start paying mortgage insurance premiums in 2010? If <b>yes</b> , please attach details .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 34 Did you purchase a motor vehicle or boat during 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| If <b>yes</b> , attach documentation showing sales tax paid.   |                          |                          |
| 35 Did you purchase a hybrid vehicle in 2010? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| If <b>yes</b> , enter year, make, model, and date purchased: .....   |                          |                          |
| 36 Did you donate a vehicle in 2010? If yes, attach Form 1098C .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 37 What was the sales tax rate in your locality in 2010? _____ % State ID .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 38 Did you or your spouse make gifts of over \$13,000 to an individual or contribute to a prepaid tuition plan? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 39 Did you make gifts to a trust? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 40 If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| If <b>yes</b> , please attach details.   |                          |                          |
| 41 Did you or your spouse participate in a medical savings account in 2010? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| If <b>yes</b> , please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)   |                          |                          |
| 42 Did you make a loan at an interest rate below market rate? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 43 Did you pay any individual for domestic services in 2010? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 44 Did you pay interest on a student loan for yourself, your spouse, or your dependents? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 45 Did you, your spouse, or your dependents attend post-secondary school in 2010? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 46 Did a lender cancel any of your debt in 2010? (Attach any Forms 1099-A or 1099-C) .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 47 Did you receive any income not included in this Tax Organizer? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| If <b>yes</b> , please attach information.   |                          |                          |

**ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND**

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| 48 If your tax return is eligible for Electronic Filing, would you like to file electronically? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 49 The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit? ..... | <input type="checkbox"/> | <input type="checkbox"/> |

**Caution:** Review transferred information for accuracy.

- 50 If **yes**, please provide the following information:
- a Name of your financial institution .....
- b Routing Transit Number (must begin with 01 through 12 or 21 through 32) .....
- c Account number .....
- d What type of account is this? .....
- Checking  Savings

Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

## Business/Investment Questions

**ORG4**

	Yes	No
<b>1</b> Did you receive stock from a stock bonus plan with your employer? ..... (Do not include stock sales included on your W-2.)	<input type="checkbox"/>	<input type="checkbox"/>
<b>2</b> Did you buy or sell any stocks or bonds in 2010? ..... If <b>yes</b> , attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	<input type="checkbox"/>	<input type="checkbox"/>
<b>3</b> Did you surrender any U.S. savings bonds during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>4</b> Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>5</b> Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>6</b> Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>7</b> Do you have any investments for which you were <b>not</b> personally 'at risk' (other than sole proprietorship or farm)? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>8</b> Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>9</b> Did you sell property or equipment on installment in 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>10</b> Did you have any business related educational expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>11</b> Did you do a 'like-kind' exchange of property in 2010? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>12</b> Do you have records, as described below, to support expenses? .....	<input type="checkbox"/>	<input type="checkbox"/>
<p>Tax law and IRS regulations allow deductions for travel and entertainment if adequate records can be presented. Information must include: <b>1</b> Amount; <b>2</b> Time and place; <b>3</b> Date; <b>4</b> Business purpose; <b>5</b> Description of gift(s); and <b>6</b> Business relationship of recipient.</p>		
<b>13</b> Did you purchase special fuels for non-highway use? .....	<input type="checkbox"/>	<input type="checkbox"/>
<p>If <b>yes</b>, please list the type of use and the number of gallons for each fuel.</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>		
<b>14</b> Was Form 8903 (Domestic Production Activities Deduction) included in your 2009 federal income tax return? .....	<input type="checkbox"/>	<input type="checkbox"/>



**Basic Taxpayer Information**

**ORG6**

**PERSONAL INFORMATION**

	TAXPAYER	SPOUSE
Last name .....	_____	_____
First name .....	_____	_____
Middle initial and suffix .....	MI ..... _____ Suffix ..... _____	MI ..... _____ Suffix ..... _____
Social security number .....	_____	_____
Occupation .....	_____	_____
Work phone/extension .....	_____	_____
Cell phone .....	_____	_____
E-mail address .....	_____	_____
Birthdate <b>or</b> age as of 1-1-2011 ...	MM/DD/YYYY ..... _____	MM/DD/YYYY ..... _____
Blind .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Contribute to Presidential Election Campaign Fund .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Eligible to be claimed as a dependent on another return .....	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Street address ... \_\_\_\_\_ Apartment number ..... \_\_\_\_\_  
 City ..... \_\_\_\_\_ State ..... \_\_\_\_\_ ZIP code ..... \_\_\_\_\_  
 Home phone ..... \_\_\_\_\_ Foreign country ..... \_\_\_\_\_  
 Fax ..... \_\_\_\_\_ Foreign phone ..... \_\_\_\_\_

**FILING STATUS**

**1** Single

**2** Married filing jointly

**3** Married filing separately

    Check this box if you **did not** live with spouse at any time during the year ..... ▶

    Check this box if you are eligible to claim spouse's exemption ..... ▶

    Check this box if your spouse itemizes deductions ..... ▶

**4** Head of household

    If the qualifying person is a child but not your dependent, enter

    Child's name ..... Child's social security number ..... \_\_\_\_\_

**5** Qualifying widow(er)

    Check the box for the year the spouse died ..... ▶ 2008  2009

**DEPENDENT INFORMATION**

Full Name (first name, middle initial, last name, suffix)	Social Security Number	**Code	Date of Birth	2010 Child Care Expense
		+Months in U.S.	*Not Citizen	2009 Child Care Expense
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

\*\* For the Dependent Code, enter the following: L = dependent child who lived with you  
 N = dependent child who didn't live with you due to divorce or separation  
 O = other dependent  
 Q = not a dependent (but is a person who qualifies your client for the earned income credit and/or the credit for child and dependent care expenses)

+ Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.

\* Check this box if dependent child is not a U.S. citizen or resident alien

# Interest and Dividend Income

ORG11

T = Taxpayer, S = Spouse, J = Joint

## INTEREST INCOME

**Attach all copies of your Form 1099-INTs here.**

**\*\*Type of Interest**  
 blank = Regular taxable interest  
 ME1 = ME bond interest in federal income  
 MD1 = MD nontaxable interest — taxable federal

MA1 = MA bank interest  
 NH1 = NH nontaxable interest — taxable federal  
 NJ1 = NJ nontaxable interest — taxable federal

OK1 = OK bank interest  
 TN1 = TN nontaxable interest — taxable federal  
 WV1 = WV bond interest in federal income

TSJ	X*	Payer Name	2010 Box 1 Interest	Type of Interest**	2010 Box 3 US/Treasury Interest	2010 Box 8 Tax Exempt	State	2009 Box 1 + 3

X\* Check if you did not receive income from this account in 2010.

## DIVIDEND INCOME

**Attach all copies of your Form 1099-DIVs here.**

TSJ	X*	Payer Name	2010 Box 1a Ordinary Dividends	2010 Box 1b Qualified Dividends	2010 Box 2a Capital Gains	State	2009 Box 1a + 2a

X\* Check if you did not receive income from this account in 2010.

## Medical and Tax Expenses

**ORG13**

<b>MEDICAL AND DENTAL EXPENSES</b>	<b>2010</b>	<b>2009</b>
<b>1</b> Prescription medications .....		
<b>2</b> Health insurance premiums (enter Medicare B on ORG10) .....		
<b>3</b> Qualified long-term care premiums		
<b>a</b> Taxpayer's gross long-term care premiums .....		
<b>b</b> Spouse's gross long-term care premiums .....		
<b>c</b> Dependent's gross long-term care premiums .....		
<b>4</b> Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity .....		
<b>5a</b> Insurance reimbursement .....		
<b>b</b> Medical (MSA) or health (HSA) savings account distributions .....		
<b>6</b> Doctors, dentists, etc .....		
<b>7</b> Hospitals, clinics, etc .....		
<b>8</b> Lab and X-ray fees .....		
<b>9</b> Expenses for qualified long-term care .....		
<b>10</b> Eyeglasses and contact lenses .....		
<b>11</b> Medical equipment and supplies .....		
<b>12</b> Miles driven for medical purposes .....		
<b>13</b> Ambulance fees and other medical transportation costs .....		
<b>14</b> Lodging .....		
<b>15</b> Other medical and dental expenses:		
<b>a</b> _____ .....		
<b>b</b> _____ .....		
<b>c</b> _____ .....		
<b>d</b> _____ .....		
<b>e</b> _____ .....		
<b>f</b> _____ .....		
<b>g</b> _____ .....		
<b>h</b> _____ .....		
<b>i</b> _____ .....		
<b>j</b> _____ .....		
<b>TAXES</b>	<b>2010</b>	<b>2009</b>
Enter state and local income taxes on <b>ORG7, ORG8, ORG10,</b> and <b>ORG40.</b>		
<b>16</b> Real estate taxes paid on principal residence .....		
<b>17</b> Real estate taxes paid on additional homes or land .....		
<b>18</b> Auto registration fees based on the value of the vehicle .....		
<b>19</b> Other personal property taxes .....		
<b>20</b> Other taxes:		
_____ .....		
_____ .....		

## Interest Paid and Cash Contributions

ORG14

HOME MORTGAGE INTEREST PAID			
Lender's Name	Check if NOT on Form 1098	2010	2009
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

POINTS PAID ON LOAN TO BUY, BUILD, OR IMPROVE MAIN HOME		
Lender's Name	Check if NOT on Form 1098	2010
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

SELLER FINANCED MORTGAGE		
Individual's Name	Identifying Number	Address
		-----
		-----

OTHER POINTS					
Enter below any points paid on a home equity loan (other than to improve your main home), a loan for a second home, or a refinanced mortgage.					
Lender's Name	Loan Over	Points Paid	Date of Loan	Loan Length (years)	2009 Points Deducted
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

INVESTMENT INTEREST		
	2010	2009
Investment interest (for example: margin interest, interest paid on loans used for property held for investment, etc) .....		



# Noncash Contributions

ORG14A

Copy 1

Name of Donee Organization	Check if Statement Exists for Gifts of \$250 or More	Fair Market Value	Prior Year Fair Market Value
A _____	<input type="checkbox"/>		
B _____	<input type="checkbox"/>		
C _____	<input type="checkbox"/>		
D _____	<input type="checkbox"/>		
E _____	<input type="checkbox"/>		
F _____	<input type="checkbox"/>		
G _____	<input type="checkbox"/>		
H _____	<input type="checkbox"/>		
I _____	<input type="checkbox"/>		

**Note:** Complete sections below **only** if the **total** noncash contributions are **more than \$500**.

Description of Donated Property	Type**	Address of Donee Organization
A _____		
B _____		
C _____		
D _____		
E _____		
F _____		
G _____		
H _____		
I _____		

* Method for Fair Market Value	Date of Contribution	Complete these columns <b>only</b> for each contribution over \$500		
		Date Acquired (month, year)	How Acquired***	Your Cost
A _____				
B _____				
C _____				
D _____				
E _____				
F _____				
G _____				
H _____				
I _____				

**\* Methods of determining FMV:**

- |               |                          |                   |             |
|---------------|--------------------------|-------------------|-------------|
| Appraisal     | Capitalization of income | Present value     | Thrift shop |
| Average share | Comparative sales        | Replacement cost  |             |
| Catalog       | Consignment shop         | Reproduction cost |             |

**\*\* Type of Donated Property**

- |                                 |                                   |  |
|---------------------------------|-----------------------------------|--|
| Household/clothing items        | Business equipment                | Intellectual property                  |
| Motor vehicle, boat or airplane | Business inventory                | Real property, conservation property   |
| Art, other than self-created    | Stock, publicly traded            | Real property, other than conservation |
| Art, self-created               | Stock, other than publicly traded | Other personal property                |
| Collectibles                    | Securities, other than stock      | Other intangible property              |

\*\*\*How Property was Acquired: Purchase, Gift, Inheritance, Exchange

## Miscellaneous Itemized Deductions

ORG15

MISCELLANEOUS DEDUCTIONS (2% LIMITATION)	2010	2009
<b>Employee Business Expenses</b>		
<b>Note:</b> If you have any travel, transportation, meals or entertainment expenses or your employer reimbursed you for <b>any</b> of your job-related expenses, complete <b>ORG17</b> for <b>all</b> your employee expenses.		
1 Union and professional dues .....		
2 Professional subscriptions .....		
3 Uniforms and protective clothing .....		
4 Job search costs .....		
5 Other unreimbursed employee expenses:		
a _____ .....		
b _____ .....		
c _____ .....		
d _____ .....		
e _____ .....		
<b>Other Expenses Subject to the 2% Limitation</b>		
Treat all MACRS assets for this activity as qualified Indian reservation property? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ..... <input type="checkbox"/> Regular <input type="checkbox"/> Extension <input type="checkbox"/> No		
Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
Was this property located in a Qualified Disaster Area? ..... <input type="checkbox"/> Yes <input type="checkbox"/> No		
Check to code assets as Investment Expense ..... <input type="checkbox"/>		
Use <b>ORG50</b> to record dispositions.		
Use <b>ORG51A</b> to enter additional assets.		
Use <b>ORG11a</b> for investment expenses related to interest income.		
Use <b>ORG11b</b> for investment interest related to dividend income.		
6 Tax return preparation fees .....		
7 Investment counsel and advisory fees .....		
8 Certain attorney and accounting fees .....		
9 Safe deposit box rental .....		
10 IRA custodial fees .....		
11 Other expenses (list):		
a _____ .....		
b _____ .....		
c _____ .....		
d _____ .....		
e _____ .....		
OTHER MISCELLANEOUS DEDUCTIONS	2010	2009
12 Amortizable bond premiums (acquired before 10/23/86) .....		
13 Gambling losses (to the extent of gambling income) .....		
14 Other miscellaneous deductions:		
a _____ .....		
b _____ .....		
c _____ .....		
d _____ .....		
e _____ .....		



# Tax Payments

ORG40

## 2010 ESTIMATED TAX PAYMENTS

	Federal		State			Local		
	Date	Amount	Date	Amount	ID	Date	Amount	ID
1 Qtr 1 due by 04/15/10								
2 Qtr 2 due by 06/15/10								
3 Qtr 3 due by 09/15/10								
4 Qtr 4 due by 01/18/11								
5a Additional payments ..								
b Additional payments ..								
c Additional payments ..								
d Additional payments ..								

## OTHER TAX PAYMENTS

	Federal	State	Local
6 2009 overpayment applied to 2010 .....			
7 Balance due paid with 2009 return .....			
8a 2009 Quarter 4 payments paid in 2010 .....			
b 2009 extension payments paid in 2010 .....			
9 Other taxes paid in 2010 for prior years (include explanation) .....			

## 2011 ESTIMATED TAX WORKSHEET

If you expect any significant change in your income or expenses in 2011, please enter the increase or decrease below.

**Income**

10 Wages .....	Taxpayer .....	
	Spouse .....	
11 Self-Employment Income .....	Taxpayer .....	
	Spouse .....	
12 Capital Gains (sale of stock, real estate, etc) .....		
13 Other Income:		
Description .....		

**Deductions**

14 Allowable Itemized Deductions .....	
15 Other deductions (such as alimony paid, early withdrawal penalties, etc):	
Description .....	
16 Federal Withholding .....	
17 Number of personal exemptions expected for 2011 .....	

## ADDITIONAL INFORMATION

18 Check to use your 2010 tax amount for your 2011 estimate .....	<input type="checkbox"/>
19 If you have an overpayment of 2010 taxes, check the box to indicate how you want your overpayment applied.	
a Apply entire overpayment to next year and refund excess .....	<input type="checkbox"/>
b Apply entire overpayment to first quarter and refund excess .....	<input type="checkbox"/>
20 Amount to apply if not entire overpayment .....	
21 Number of installments for estimated tax (1 - 4) .....	

# State Information Worksheet

ORG60

## GENERAL INFORMATION

	<b>Taxpayer</b>	<b>Spouse</b>
1 Enter your state of residence .....		
2 Check the appropriate box if:	<b>Taxpayer</b>	<b>Spouse</b>
a Full year resident .....	<input type="checkbox"/>	<input type="checkbox"/>
b Part year resident .....	<input type="checkbox"/>	<input type="checkbox"/>
c Nonresident .....	<input type="checkbox"/>	<input type="checkbox"/>
	Date of entry: _____	Date of exit: _____
3 Resident locality: _____		
4 County: _____ School district: _____ School district number: _____		
5 Check if disabled .....	<input type="checkbox"/>	<input type="checkbox"/>

## STATE CREDITS

6 Description/type of credit (for example, solar energy, carpool)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## VOLUNTARY STATE CONTRIBUTIONS

7 Description/type of contribution (for example, wildlife, cancer)	Code	Amount
a _____		
b _____		
c _____		
d _____		
e _____		

## MISCELLANEOUS QUESTIONS

		<b>Yes</b>	<b>No</b>
8 Did you file a state return for 2009? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you want state forms and instructions sent to you next year? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you want any applicable penalty and interest calculated and added to the return? .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 How do you want your state refund (if any) applied?			
a Refunded .....	<input type="checkbox"/>	b Apply to 2011 estimates .....	<input type="checkbox"/>
		c Apply to 2011 taxes .....	<input type="checkbox"/>
12 Additional state information: _____			
_____			
_____			