Recchia & Company
11524 West 183rd Street, Suite 101
Orland Park, IL 60467
Telephone number: (708) 479-8585
Fax number: (708) 479-8686
E-mail address:

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2010 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table)	1
	1=married filing separate and lived with spouse	
	Year spouse died, if qualifying widow(er) (2008 or 2009)	
Taxpayer	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Spouse	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	
Foreign Address	Region	
	Postal code	
	Country	

Filing Status

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

Please add, change or delete information for 2010.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone	
	Work phone	
	Work extension	
	Daytime phone (table)	1
	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

2010	1040	US	Dependents	2

Please add, change or delete information for 2010.

DEPENDENTS

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

Type of Dependent

1 = Child living w/taxpayer
2 = Child not living w/taxpayer
3 = Dependent other than child
4 = Head of household only, not a dependent
5 = Earned income credit only, not a dependent

Earned Income Credit

1 = When applicable (default)
2 = Student age 19 to 23
3 = Disabled
4 = Force
5 = Suppress

2010	1040	US	Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2010, please checkthe appropriate box and provide any necessary or additional information on the last page of your Tax Organizer.

PERSONAL INFORMATION

Yes No

☐ ☐ Did your marital status change during the year?

☐ ☐ Did your address change during the year?

What **county** do you live in? ______________________________

☐ ☐ Could you be claimed as a dependent on another person's tax return for 2010? *Note: To avoid delays with the IRS on your own return, be sure that any dependent children filing a return which we are not preparing do not claim themselves on their return.*

☐ ☐ We offer your Client Copy of the tax return either in a PDF format via our website or the traditional paper copy. Do you want a PDF copy instead of the traditional paper copy? If you would like both, please write the word "both" here.

☐ ☐ Were you or your spouse in active service for the military in 2010?

☐ ☐ Are you or your spouse a teacher with unreimbursed school supplies? If yes, how much $__________

DEPENDENT INFORMATION

☐ ☐ Were there any changes in dependents? If yes, please explain:

____

☐ ☐ Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2010?

☐ ☐ Do you have any dependent children under age 19 or full-time students under age 24 at the end of 2010, with interest, dividend income in excess of $950? or total investment income (interest, dividends & capital gains) in excess of $1,900?

☐ ☐ Did you maintain a home for someone not claimed as a dependent?

☐ ☐ Are you claiming a deduction for a dependent who **did not** live more than 6 months in your home and you were separated or divorced in 2010 or earlier?

☐ ☐ Has the IRS sent you Form 8836, Qualifying Children Residency Statement?

☐ ☐ Did you pay for child care (babysitting, daycare) for other than personal, social evenings/events? If yes and this is your first year, please provide provider's name, address, social security number/EIN and amount paid.

____

____

____

INCOME INFORMATION

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

☐ ☐ Did you receive a damage award for personal injury or sickness?

☐ ☐ Did you receive or pay alimony (not child support)? If yes, how much $ _______

☐ ☐ 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 or unemployment income?

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

☐ ☐ Did you 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?

☐ ☐ If you have such an interest in a financial account in a foreign country, did the balance exceed $10,000 at any time during 2010.

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

☐ ☐ Did you (or your spouse) receive a pension or annuity in 2010 performed as an employee of the U.S, state or local government from work not covered by social security?

☐ ☐ Did you sell any inherited property in 2010

☐ ☐ Did you (or your spouse) elect to receive COBRA continuation health insurance coverage (35% of your normal insurance premium) during 2010 as a result of involuntary termination from employment?

☐ ☐ Did you make, receive or are a party to an "interest-free" loan with any other person, company, trust or any other type of entity?

2010	1040	US	Miscellaneous Questions

PURCHASES, SALES AND DEBT INFORMATION

☐ ☐ Did you start a business or farm, purchase rental or royalty property, or acquire a new or additional 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 purchase a personal residence and you (and/or your spouse) received the First-Time Homebuyer's credit in 2008 or 2009? If yes, indicate which year.

____

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

☐ ☐ Did you buy or sell any stocks, bonds or other investment property in 2010?

☐ ☐ Did you participate in puts, calls or other "short the box" stock transactions with a stock broker in 2010?

☐ ☐ Did you purchase a brand-new motor vehicle in 2010?

☐ ☐ Did you purchase a new alternative motor vehicle

☐ ☐ Did you make any energy efficiency improvements (furnace, central air conditioner, insulation, solar or wind powered equipment) to your home in 2010?

☐ ☐ Did you have any debts cancelled, forgiven or negotiate down a debt?

☐ ☐ Did anyone owe you money which had become uncollectible?

RETIREMENT PLAN INFORMATION

☐ ☐ Did you receive a distribution from a retirement plan (401(k), IRA SEP, SIMPLE, Pension or Profit-Sharing or other Qualified Plan)?

☐ ☐ Did you contribute to a retirement plan (401(k), IRA SEP, SIMPLE,) at work?

☐ ☐ Did you, or do you intend to contribute to a traditional or Roth IRA for this year?

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

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

☐ ☐ Do you or your spouse have a "self-directed" IRA?

2010 | 1040 | US | Miscellaneous Questions

EDUCATION INFORMATION

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

☐ ☐ Did you receive a employer-provided educational assistance?

☐ ☐ Did you, or will you contribute to a Coverdell 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?

DEDUCTION INFORMATION

☐ ☐ 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)?

☐ ☐ Do you have donee acknowledgement (receipt, letter, etc.) to substantiate your charitable donations? The law now requires a bank record (cancelled check) or a receipt or letter from the charity for all donations for **ANY** amount of money.

☐ ☐ If you made non-cash donations (clothing, household items, etc,) were they in good or better condition at the time of the donation?

☐ ☐ Did you pay PMI (private mortgage insurance) on a new home mortgage issued after December 31, 2006?

ESTIMATED TAX INFORMATION

☐ ☐ Did you apply an overpayment of 2009 taxes to your 2010 estimated tax (instead of being refunded)?

☐ ☐ If you have an overpayment of 2010 taxes, do you want the excess applied to your 2011 estimated tax (instead of being refunded)?

☐ ☐ Do you expect your 2011 income, tax withholding, deductions or dependents to be different from 2010? If yes, please explain: ____________________

____

MISCELLANEOUS

☐ ☐ Do you want to electronically file your tax return?

2010	1040	US	Miscellaneous Questions

☐ ☐ Would you like to have any refund direct deposited? **(If yes, attach voided check for account info. We only assume responsibility for the correctness of the routing & account numbers if a voided check is attached. If incorrect, someone else may get your refund!)**

☐ ☐ If you have a refund due, do you want your it directly deposited to more than one financial account (checking, savings, and retirement)?

☐ ☐ 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 tax preparer?

☐ ☐ Was your home rented out or used for business?

☐ ☐ Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary?

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

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

☐ ☐ Did you engage the services of any household employees?

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

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

☐ ☐ Have you started any adoption process?

☐ ☐ Did you engage in any bartering transactions?

☐ ☐ Were you or any of your property located in a federally declared disaster area?

☐ ☐ Did you use a credit card to pay any federal, state or local income tax in 2010

I (we) have answered the above questions accurately, to the best of my (our) knowledge.

2010	1040	US	Miscellaneous Questions

____
Taxpayer Date

____
Spouse Date

INTELLIGENCE TEST (Answers On Next Page)

__________ 1. Do they have a 4th of July in England?

__________ 2. How many birthdays does the average person have?

__________ 3. Some months have 31 days; how many have 28?

__________ 4. In baseball, how many outs are there in one inning ?

__________ 5. Is it legal for a man in California to marry his widow's sister?

__________ 6. Divide 30 by 1/2 and add 10. What is the answer?

__________ 7. If there are 3 apples and you take away 2, how many do you have?

__________ 8. A farmer has 17 sheep and all but 9 die. How many are left?

__________ 9. How many animals of each sex did Moses take on the ark?

__________ 10. How many two-cent stamps are in a dozen?

THE ECONOMY IS SO-O-O-O BAD... HOW BAD IS IT?

The economy is so bad that..:

1. I got a pre-declined credit card in the mail!

2. CEO's are now playing *miniature* golf!

3. If the bank returns your check marked "Insufficient Funds," you call them to ask if they meant you or them!

4. Motel 6 won't leave the light on anymore!

5. McDonald's is now selling the 1/8 pounder!

6. Hot Wheels and Matchbox stocks are worth more than GM!

7. You order a burger at McDonald's and the kid behind the counter asks "Can you afford fries with that?"

8. Dick Cheney took his stockbroker hunting!

9. Parents in Beverly Hills fired their nannies and actually learned their children's names!

10. The Mafia is laying off judges!

Answer Key to Intelligence Test

1. Do they have a 4th of July in England?
Yes, it comes after the 3rd of July.

2. How many birthdays does the average person have?
Just one and its celebrated every year.

3. Some months have 31 days; how many have 28?
12, all of them!

4. In baseball, how many outs are there in one inning ?
6, three outs per team

5. Is it legal for a man in California to marry his widow's sister?
No, because he is deceased.

6. Divide 30 by 1/2 and add 10. What is the answer?
70... 30 divided by 1/2 equals 60 plus 10.

7. If there are 3 apples and you take away 2, how many do you have?
2, you took them, remember?

8. A farmer has 17 sheep and all but 9 die. How many are left?
9, eight of them died...

9. How many animals of each sex did Moses take on the ark?
Zero, Moses did not have an ark, Noah did!

10. How many two-cent stamps are in a dozen?
12!

2010	1040	US/IL	Direct Deposit & Estimates (Form 1040 ES)	3, 6

Please enter all pertinent 2010 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)

2010 ESTIMATED TAX / 1040-ES (6)

Federal

	Amount Paid	Date Paid	TS	2010 Voucher Amount
Overpayment applied from 2009				
1st quarter payment (due 4/15/10)				
2nd quarter payment (due 6/15/10)				
3rd quarter payment (due 9/15/10)				
4th quarter payment (due 1/17/11)				
Additional Estimated Tax Payments				
Paid with extension (not later than 4/18/11)				

State

	Amount Paid	Date Paid	TS	2010 Voucher Amount
Overpayment applied from 2009				
1st quarter payment (due 4/15/10)				
2nd quarter payment (due 6/15/10)				
3rd quarter payment (due 9/15/10)				
4th quarter payment (due 1/17/11)				
Additional Estimated Tax Payments				
Paid with extension (not later than 4/18/11)				

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

Please enter all pertinent 2010 information.

APPLICATION OF 2010 OVERPAYMENT (7.1)

If you have an overpayment of 2010 taxes, do you want the excess refunded?. ☐ or applied to 2011 estimate?. . . . ☐

Other (please explain): ______

2011 ESTIMATED TAX INFORMATION

Do you expect your 2011 taxable income to be different from 2010? . . . . Yes ☐ No ☐

If "yes" explain any differences in income, deductions, dependents, etc.: ______

Do you expect your 2011 withholding to be different from 2010? . . . . Yes ☐ No ☐

If "yes" explain any differences: ______

2010	1040	US	Wages, Pensions, Gambling Winnings	10, 13.1, 13.2

Please enter all pertinent 2010 amounts & attach all W-2, W-2G and 1099-R forms.
Last year's amounts are provided for your reference.

WAGES, SALARIES, TIPS (10)

No.	Name of Employer (Box c)	1=retirement plan (Box 13)	1=spouse	Wages, Tips, Other Compensation (Box 1)	Tax Withheld Federal (Box 2)	Social Security (Box 4)	Medicare (Box 6)	State (Box 17)	Local (Box 19)	2009 Wages

PENSIONS, IRA DISTRIBUTIONS (13.1)

No.	Name of Payer	1=spouse	1=IRA/SEP/SIMPLE	Distribution code #1	Distribution code #2	Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld Federal (Box 4)	State (Box 10)	Value of all IRAs at 12/31/10	2009 Distribution

GAMBLING WINNINGS (W-2G) (13.2)

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld Federal (Box 2)	State (Box 14)	2009 Winnings

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

	2010 Amount	TS	2009 Amount
Total gambling losses			
Winnings not reported on Form W-2G			

2010	1040	US	Interest & Dividend Income	11, 12

Please enter all pertinent 2010 amounts & attach all 1099-INT, 1099-OID and 1099-DIV forms.
Last year's amounts are provided for your reference.

INTEREST INCOME (11)

No.	Name of Payer (also enter SSN & address for seller-financed mortgage)	1=taxpayer 2=spouse	Interest Income			Tax-Exempt Interest		Early Withdrawal Penalty (Box 2)	2009 Interest
			Banks, S&Ls, C/Us, etc. (Box 1)	Seller-Financed Mtg. (Box 1)	U.S. Bonds, T-Bills (Box 3)	Total Municipal Bonds	In-state Municipal Bonds		

DIVIDEND INCOME (12)

No.	Name of Payer	1=tp 2=sp	Dividend Income				Tax-Exempt Interest		Foreign Tax Paid (Box 6)	2009 Dividends
			Total Ordinary Dividends (Box 1a)	Qualified Dividends (Box 1b)	Total Capital Gain Distrib. (Box 2a)	U.S. Bonds (% or amt.)	Total Municipal Bonds	In-state Muni-bonds (% or amt.)		

2010	1040	US	Miscellaneous Income	14.1

Please enter all pertinent 2010 amounts and attach all 1099-MISC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.

MISCELLANEOUS INCOME

	2010 Amount		2009 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)

	2010 Taxpayer	2010 Spouse	2009 Taxpayer	2009 Spouse
Federal income tax withheld				
State income tax withheld				
Local income tax withheld				

Please enter all pertinent 2010 information. Last year's amounts are provided for your reference.

TRADITIONAL IRA CONTRIBUTIONS

	2010 Amount Taxpayer	2010 Amount Spouse	2009 Amount Taxpayer	2009 Amount 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				
2010 payments from 1/1/11 to 4/15/11				

ROTH IRA CONTRIBUTIONS

	2010 Amount Taxpayer	2010 Amount Spouse	2009 Amount Taxpayer	2009 Amount 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)

	2010 Amount Taxpayer	2010 Amount Spouse	2009 Amount Taxpayer	2009 Amount 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

	2010 Amount Taxpayer	2010 Amount Spouse	2009 Amount Taxpayer	2009 Amount 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:				

Alimony paid:	Taxpayer	Spouse
Recipient's first name		
Recipient's last name		
Recipient's SSN		
Amount paid	2009 amt:	2009 amt:

2010	1040	US	Capital Gains & Losses (Schedule D)	17

If you sold any stocks, bonds, or other investment property in 2010, please list the pertinent information for each sale below or provide a spreadsheet file with this information. Be sure to attach all 1099-B forms and brokerage statements.

No.	Quantity (Box 5)	Description of Property (Box 7)	Date Acquired	Date Sold (Box 1a)	Sales Price (gross or net) (Box 2)	Cost or Basis	Expenses of Sale (if gross sales price entered)	Federal Income Tax Withheld (Box 4)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								

2010	1040	US	Rental & Royalty Income (Schedule E)	No.	18

Please enter all pertinent 2010 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Kind of property	
Location of property	

Percentage of ownership if not 100% (.xxxx)	
Percentage of tenant occupancy if not 100% (.xxxx)	
1=spouse, 2=joint	
1=nonpassive activity, 2=passive royalty	
1=did not actively participate	
1=real estate professional	
1=rental other than real estate	
1=investment	
1=single member limited liability company	

INCOME

	2010 Amount	2009 Amount
Rents received (Form 1099-MISC, box 1)		
Royalties received (Form 1099-MISC, box 2)		

DIRECT EXPENSES

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

	2010 Amount	2009 Amount
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		
Pest control		
Plumbing and electrical		
Repairs		
Supplies		
Taxes - real estate		
Taxes - other (not entered elsewhere)		
Telephone		
Utilities		
Wages and salaries		
Other:		

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

Please enter all pertinent 2010 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.

	2010 Amount	TS	2009 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			
Other medical and dental expenses:			

TAXES PAID (State and local withholding and 2010 estimates are automatic.)

	2010 Amount	TS	2009 Amount
State income taxes - 1/10 payment on 2009 state estimate			
State income taxes - paid with 2009 state extension			
State income taxes - paid with 2009 state return			
State income taxes - paid for prior years and/or to other state			
City/local income taxes - 1/10 payment on 2009 city/local estimate			
City/local income taxes - paid with 2009 city/local extension			
City/local income taxes - paid with 2009 city/local return			

SALES AND USE TAXES PAID

	2010 Amount	TS	2009 Amount
State and local sales taxes (except autos and special items)			
Use taxes paid on 2010 purchases			
Use taxes paid with 2009 state return			
Taxes paid in 2010 on New passenger autos, light trucks, motorcycles, and motor homes purchased 2/17/09 - 12/31/09 *			
Vehicle #1 description			
Vehicle #1 purchase price			
Vehicle #1 sales tax paid			
Vehicle #1 other qualified taxes/fees paid			
Sales tax on autos not included above			
Sales tax on boats, aircraft, other special items			

OTHER TAXES PAID

	2010 Amount	TS	2009 Amount
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:			

* NOTE: Attach information on additional vehicles if more than one was purchased between 2/17/09 - 12/31/09.

2010	1040	US	Itemized Deductions (continued)	25 p2

Please enter all pertinent 2010 amounts. Last year's amounts are provided for your reference.

INTEREST PAID

	2010 Amount	TS	2009 Amount
Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:			
Home mortgage interest not reported on Form 1098:			
Payee's name			
Payee's SSN or FEIN			
Payee's street address			
Payee's city, state, ZIP			
Amount paid			
Points not reported on Form 1098:			
Mortgage insurance premiums on post 12/31/06 contracts (Box 4)			
Investment interest (interest on margin accounts):			
Passive interest			
Certain home mortgage interest included above (6251)			

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

CASH CONTRIBUTIONS

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

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

Contributions by cash or check:	2010 Amount	TS	2009 Amount
Volunteer expenses (out-of-pocket)			
Number of charitable miles			

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

Contributions by cash or check:	2010 Amount	TS	2009 Amount
Volunteer expenses (out-of-pocket)			
Number of charitable miles			

Please enter all pertinent 2010 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.

	2010 Amount	TS	2009 Amount
50% limitation (see above):			
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)

	2010 Amount	TS	2009 Amount
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):			

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

Please enter all pertinent 2010 amounts. Last year's amounts are provided for your reference.

OTHER MISCELLANEOUS DEDUCTIONS

	2010 Amount	TS	2009 Amount
Estate tax, section 691(c)			
Other miscellaneous deductions:			

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

2010	1040	US	Noncash Contributions (Form 8283)	26

If your total noncash contributions are in excess of $500 in 2010, please complete the information below for each donee using the following guidelines:

* If you contributed a motor vehicle, boat, or airplane with a claimed value of more than $500, attach Form 1099-C or other written acknowledgement received from the donee organization.

* A deduction for contributions of clothing or other household items that are not in *good* used condition or better is not allowed. In addition, a deduction for any item with minimal monetary value may be denied. However, these rules do not apply to any contribution of a single item for which a deduction of more than $500 is claimed, if a qualified appraisal for the donated property is provided.

DONATED PROPERTY INFORMATION

No.		Name of charitable organization (donee)	
		Street address	
		City, state, ZIP code	
		1=spouse, 2=joint	
		Property description (other than vehicle)	
	Vehicle	Year (yyyy)	
		Make and model	
		Condition and mileage	
		Date of contribution (m/d/y) *	
		Date acquired by donor (m/y) *	
		How acquired by donor (Table 1 or describe)	
		Donor's cost or basis	
		Fair market value	
		Method used to determine FMV (Table 2 or describe)	
No.		Name of charitable organization (donee)	
		Street address	
		City, state, ZIP code	
		1=spouse, 2=joint	
		Property description (other than vehicle)	
	Vehicle	Year (yyyy)	
		Make and model	
		Condition and mileage	
		Date of contribution (m/d/y) *	
		Date acquired by donor (m/y) *	
		How acquired by donor (Table 1 or describe)	
		Donor's cost or basis	
		Fair market value	
		Method used to determine FMV (Table 2 or describe)	
No.		Name of charitable organization (donee)	
		Street address	
		City, state, ZIP code	
		1=spouse, 2=joint	
		Property description (other than vehicle)	
	Vehicle	Year (yyyy)	
		Make and model	
		Condition and mileage	
		Date of contribution (m/d/y) *	
		Date acquired by donor (m/y) *	
		How acquired by donor (Table 1 or describe)	
		Donor's cost or basis	
		Fair market value	
		Method used to determine FMV (Table 2 or describe)	

1 How Property was Acquired	2 Method Used to Determine FMV
1 = Purchase 2 = Gift 3 = Inheritance 4 = Exchange	1 = Appraisal 2 = Thrift shop value 3 = Catalog 4 = Comparable sales For other methods, see IRS Pub. 561.

2010	1040	US	Child and Dependent Care Expenses (Form 2441)	33.1,33.2

Please enter all pertinent 2010 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)

	2010 Amount Taxpayer	2010 Amount Spouse	2009 Amount Taxpayer	2009 Amount Spouse
Dependent care expenses incurred but not paid in 2010...				
Employer-provided benefits forfeited in 2010............				

PERSONS AND EXPENSES QUALIFYING FOR DEPENDENT CARE CREDIT

No.			
	First name...........................		
	Last name...........................		
	Date of birth (m/d/y).....................		
	Social security number..................		
	Qualified dependent care expenses incurred and paid in 2010...............		2009 amt:
	1=disabled...........................		
	1=spouse, 2=joint......................		

No.			
	First name...........................		
	Last name...........................		
	Date of birth (m/d/y).....................		
	Social security number..................		
	Qualified dependent care expenses incurred and paid in 2010...............		2009 amt:
	1=disabled...........................		
	1=spouse, 2=joint......................		

No.			
	First name...........................		
	Last name...........................		
	Date of birth (m/d/y).....................		
	Social security number..................		
	Qualified dependent care expenses incurred and paid in 2010...............		2009 amt:
	1=disabled...........................		
	1=spouse, 2=joint......................		

PERSONS OR ORGANIZATIONS PROVIDING CARE (33.2)

No.			
	Name of provider........................		
	Street address..........................		
	City, state, ZIP code....................		
	Identification number (SSN or EIN)........		
	Amount paid to care provider in 2010......		2009 amt:
	1=spouse, 2=joint......................		

No.			
	Name of provider........................		
	Street address..........................		
	City, state, ZIP code....................		
	Identification number (SSN or EIN)........		
	Amount paid to care provider in 2010......		2009 amt:
	1=spouse, 2=joint......................		

ORGANIZER

2010	1040	US	Additional Information

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