



# Claudia Johnston

## Tax & Bookkeeping Services

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### 2011 Individual Income Tax Information Sheet

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This form is designed to assist you in compiling the information necessary to accurately prepare your income tax return.

Completing this form and returning it when you drop off your tax information will greatly expedite your filing process.

**PLEASE PROVIDE ALL DOCUMENTS  
THAT SAY "IMPORTANT TAX  
INFORMATION" ON THE ENVELOPE!**

Taxpayer \_\_\_\_\_ Social Sec # \_\_\_\_\_ DOB \_\_\_\_\_ Occupation \_\_\_\_\_

Spouse \_\_\_\_\_ Social Sec # \_\_\_\_\_ DOB \_\_\_\_\_ Occupation \_\_\_\_\_

Mailing Address \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Home Phone \_\_\_\_\_  
 Cell Phone \_\_\_\_\_  
 Email Address \_\_\_\_\_

Filing Status ( ) Single ( ) Married Filing Joint ( ) Head of Household ( ) Widow/Widower  
 (Check One) ( ) Married Filing Separately\* \* Spouse Name & SS#: \_\_\_\_\_

**DEPENDENT INFORMATION**

First	M.I.	Last	Relation	DOB	SS#

**Direct Deposit Info**

Would you like to have your return EFILED? ( ) Yes ( ) No

Bank Name: \_\_\_\_\_  
 Routing Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_

Would you like to have your refund direct deposited? ( ) Yes ( ) No

( ) Checking ( ) Savings

**PLEASE PROVIDE ALL DOCUMENTS THAT SAY "IMPORTANT TAX INFORMATION" ON THE ENVELOPE!**

<u>1099s</u>	
1099 - B	Stock Sales
1099 - C	Cancellation Of Debt
1099 - Div	Dividends Received From Investments
1099 - G	Unemployment Compensation
1099 - Int	Bank Interest Earned
1099 - Misc	Miscellaneous & Contract Labor Income
1099 - R	Retirement & Pension Distributions
1099 - S	Proceeds From Real Estate Sales

<u>W2s</u>	
W2	Wage Income
W2 - G	Gambling Winnings

<u>Social Security Income</u>	
SSA - 1099	Benefits Statement

<u>1098s</u>	
1098	Mortgage Interest Paid
1098 - E	Student Loan Interest
1098 - T	Tuition Statement

<u>K-1s</u>	
1041	Trust/Estate Income
1065	Partnership Income
1120-S	Shareholder Income

**\*\* By signing this form, I declare that I have provided all information to the best of my knowledge and belief, it is true, correct, and complete\*\***

Taxpayer or Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_

**Real Estate Sales/Purchases**

Bring Closing Statements from any Purchase or Sale.

**Deductible Teacher Expenses**

Amount \_\_\_\_\_ (\$250 Max)

**Stock Sales**

Name of Stock	# of Shares	Date Bought	Date Sold	Purchase Price	Sale Price

**Quarterly Estimated Tax Payments Made**

Due	Date Paid	Amt Paid	Check #
Credit Applied from 2010 Return			
4/18/2011			
6/15/2011			
9/15/2011			
1/17/2011			

**IRA Contributions Made**

Taxpayer: Traditional \_\_\_\_\_ Roth IRA \_\_\_\_\_  
 Spouse: Traditional \_\_\_\_\_ Roth IRA \_\_\_\_\_

**Medical & Dental Expenses (Paid By You)**

Insurance Premiums \_\_\_\_\_  
 Total Doctor/Dental/Hospital Visit Charges \_\_\_\_\_  
 Total Medical Supplies(glasses, hear aids, etc) \_\_\_\_\_  
 Total Prescription Drug Charges \_\_\_\_\_  
 Total Medical Miles Driven \_\_\_\_\_

**Taxes Paid**

Real Estate Taxes Paid On Your Home \_\_\_\_\_  
 Other Real Estate Taxes (not on rental property) \_\_\_\_\_  
 Sales Tax Paid On Major Purchases (Autos, Boats, Etc)  
 Item: \_\_\_\_\_ Tax Paid: \_\_\_\_\_  
 Item: \_\_\_\_\_ Tax Paid: \_\_\_\_\_

**Charitable Contributions Made**

Cash or Check: \_\_\_\_\_  
 Goodwill/Salvation Army Donations: \_\_\_\_\_  
 Non-Cash Contributions: \_\_\_\_\_  
 (Must bring receipt for non-cash over \$500)

**Other Deductions**

Tax Preparation Fee Paid \_\_\_\_\_  
 Union or Professional Dues \_\_\_\_\_  
 Investment Expenses \_\_\_\_\_  
 Safety Deposit Box Rental Fee \_\_\_\_\_

**Child Care Credit Information**

Child Care Provider's Name	Address	SSN or EIN #	Amount Paid	Child Cared For

# SELF-EMPLOYED

Business Name \_\_\_\_\_

Business Address \_\_\_\_\_

Type of Business Activity \_\_\_\_\_

Began or Acquired Business this year? ( ) Yes ( ) No

Accounting Method ( ) Cash ( ) Accrual ( ) Other (specify) \_\_\_\_\_

## Income

Gross Receipts or Sales \_\_\_\_\_  
Returns & Allowances \_\_\_\_\_

## Expenses

Advertising \_\_\_\_\_  
Commissions & Fees \_\_\_\_\_  
Contract Labor \_\_\_\_\_  
Employee Benefit Programs \_\_\_\_\_  
Insurance (other than health) \_\_\_\_\_  
Interest: \_\_\_\_\_  
    Mortgage \_\_\_\_\_  
    Other \_\_\_\_\_  
Legal & Professional Services \_\_\_\_\_  
Office Expenses \_\_\_\_\_  
Pension & Profit Sharing Plans \_\_\_\_\_  
Rent or Lease: \_\_\_\_\_  
    Equipment \_\_\_\_\_  
    Vehicles \_\_\_\_\_  
    Office \_\_\_\_\_  
    Other \_\_\_\_\_  
Repairs & Maintenance \_\_\_\_\_  
Supplies \_\_\_\_\_  
Taxes & Licenses \_\_\_\_\_  
Travel \_\_\_\_\_  
Meals & Entertainment \_\_\_\_\_  
Utilities \_\_\_\_\_  
Wages (reported on W2s) \_\_\_\_\_  
Other Expenses: \_\_\_\_\_  
    Continuing Education \_\_\_\_\_  
    Business Telephone \_\_\_\_\_  
    Business Cell Phone \_\_\_\_\_  
    Bank Fees \_\_\_\_\_  
    Credit Card Fees \_\_\_\_\_  
    Dues & Publications \_\_\_\_\_  
    Uniforms \_\_\_\_\_  
    Website & Internet \_\_\_\_\_  
    Public Relations \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Cost of Goods Sold

Beginning Inventory \_\_\_\_\_  
Purchases (For Resale) \_\_\_\_\_  
Contract Labor \_\_\_\_\_  
Materials & Supplies \_\_\_\_\_  
Ending Inventory \_\_\_\_\_

## Business Auto Mileage

Vehicle # 1 \_\_\_\_\_  
Date Put In Service \_\_\_\_\_  
Business Miles \_\_\_\_\_  
Commuting Miles \_\_\_\_\_  
Personal Miles \_\_\_\_\_  
Total Miles Driven \_\_\_\_\_

Vehicle # 2 \_\_\_\_\_  
Date Put In Service \_\_\_\_\_  
Business Miles \_\_\_\_\_  
Commuting Miles \_\_\_\_\_  
Personal Miles \_\_\_\_\_  
Total Miles Driven \_\_\_\_\_

## Home Office

Date Purchased: \_\_\_\_\_  
Amount Paid: \_\_\_\_\_  
Total Sq. Ft \_\_\_\_\_  
Bus. Use Sq. Ft. \_\_\_\_\_  
Hours used per day for Business \_\_\_\_\_  
Mortgage Interest \_\_\_\_\_  
Real Estate Taxes \_\_\_\_\_  
Home Insurance \_\_\_\_\_  
Repairs \_\_\_\_\_  
Improvements \_\_\_\_\_  
Electricity \_\_\_\_\_  
Gas \_\_\_\_\_  
Garbage \_\_\_\_\_  
Water \_\_\_\_\_  
Total Utilities \_\_\_\_\_

## Major Purchases - Capital Expenses

Item Bought	Date	Cost
Item Bought	Date	Cost
Item Bought	Date	Cost



# RENTAL INCOME WORKSHEET

Property # 1 Address \_\_\_\_\_

Property # 2 Address \_\_\_\_\_

Property # 3 Address \_\_\_\_\_

Property # 4 Address \_\_\_\_\_

Property # 5 Address \_\_\_\_\_

Property # 6 Address \_\_\_\_\_

	#1	#2	#3	#4	#5	#6
TOTAL RENTS RECEIVED						
ROYALTIES						

Advertising						
Cleaning & Maintenance						
Lease fees / Commissions						
Insurance						
Legal and Accounting						
Management/HOA Fees						
Interest - Mortgage Interest						
Other Interest						
Repairs - Misc.						
Supplies						
Taxes						
Utilities						
Other: (List)						
Oil Depletion						
Major Purchase - Capital Expense	Item bought			Date Bought	Cost	
(Appliances, improvements, etc)						

### Rental Auto Mileage

Vehicle # 1	_____	Vehicle # 2	_____
Date Put In Service	_____	Date Put In Service	_____
Rental Use Miles	_____	Rental Use Miles	_____
Commuting Miles	_____	Commuting Miles	_____
Personal Miles	_____	Personal Miles	_____
Total Miles Driven	=====	Total Miles Driven	=====