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Tax Organizer for Individuals

Enclosed is an organizer that we provide to assist in gathering the information necessary to prepare your individual income tax returns. You can now schedule your appointment online; simply go to our website and click on Resources and Appointment Calendar. If you are a returning client and your situation has not changed you can drop off, fax, e-mail or upload your tax documents. To obtain an upload account call our office and a user name and password will be e-mailed to you.

The Internal Revenue Service matches information returns with amounts reported on tax returns. A negligence penalty may be assessed when income is unreported or when deductions are overstated. Accordingly, all information returns reflecting amounts reported to the Internal Revenue Service should be submitted with this organizer. Forms such as:

W-2 Schedules	K-1 (forms 1065, 1120S, 1041)
1099-INT	Annual Brokerage Statements
1099-DIV	1098-Mortgage Interest
1099-B	8886 (Reportable transactions)
1099-MISC	HUD-1 for Real Estate Sales/Purchases
1099 (any other)	1098-T
	1099-A or C for foreclosures and debt cancellation

For your convenience, there is an engagement letter included on our website (www.profoundfinancial.com) which explains the services we will provide to you. Please sign a copy of the engagement letter and return the signed copy to our office. Keep a copy for your records. To continue providing quality services on a timely basis, we urge you to collect your information as soon as possible and send the completed package to us once you have it compiled. The filing deadline for your income tax return is April 17, 2012. In order to meet this filing deadline your completed tax organizer and all tax documents needs to be received no later than April 6, 2012. **Any information received after that date may require that an extension of time be filed for this return. If an extension of time is required, any tax due must be paid with that extension. Any taxes not paid by the filing deadline may be subject to late payment penalties and interest.** We look forward to providing services to you. Should you have questions regarding any items, please do not hesitate to contact us.

You MUST fill out this organizer each year as the questions are applicable to the calendar year and some questions are different.

Returning clients, if nothing has changed in section 1, please just input your name and write no changes across the address. If you cannot take certain dependents you took in the past or can take dependents you did not take in the past you must supply this information in the dependent section.

Section 1
General Information

Name ____ Spouse's Name ____

Your SSN ____ Spouse's SSN ____

Your Occupation ________________________________ Spouse's Occupation ________________________________

Your Date of Birth ______________________________ Spouse's Date of Birth ______________________________

Home Address ________________________________ City ________________ State _________ Zip ___________

Home Phone ______________________ Work Phone ______________________ Cell Phone ________________

Your E-mail ____________________________________ Spouse's E-mail ____________________________________

Section 2
Dependents

Name on Social Security Card	Social Security #	Birth Date	Lived with you?	Relationship

Section 3
Questionnaire

PERSONAL INFORMATION		
	Yes	**No**
Are either you or your spouse legally blind? Who________________________		
Were you legally married as of December 31^{st}?		
If yes, were you living with your spouse as of December 31^{st}?		
Did your spouse die within the last 2 years? If yes, date of death____________________		
Can someone else claim you or your spouse as a dependent on their tax return?		
Are you a member of the military?		
Did you change jobs or leave a job in 2010?		
DEPENDENT INFORMATION		
Did you pay for child care during the tax year that allowed you to work?		
Were any children born or adopted last year?		
Did you provided over half the support for any other person(s) during the year?		
Do you have any children with investment income greater than $1,900?		
INCOME INFORMATION		
Did you buy or sell any stocks or bonds during the tax year or did any securities become worthless?		
Do you or your spouse receive payments from a pension or profit sharing plan?		
Did you or your spouse receive Social Security or disability payments during the tax year?		
Did you or your spouse receive unemployment payments during the tax year?		
Did you or your spouse receive tip income not reported to your employer?		
Did you or your spouse pay alimony or collect alimony during the tax year?		
Did you start a business, purchase rental property, or acquire interests in Partnerships or S-Corps?		
Did you receive any Gambling winnings?		
Did you have any debt cancelled or forgiven?		
Did you have foreign income, pay any foreign taxes or file any foreign information reporting or tax return forms or were you a grantor of a foreign trust or have any signature authority over a foreign account?		

DEDUCTION & CREDIT INFORMATION		
	Yes	**No**
Did you or anyone in your family pay student loan interest?		
Did you incur any casualty or theft losses during the tax year?		
Did you contribute any money to an IRA, an education savings, or 529 plan last year?		
Do you want to contribute to an IRA before April 17?		
Did you incur any moving expenses during the tax year?		
Did you own your own home during the tax year?		
Did you or your spouse convert a traditional IRA into a Roth IRA during 2010 or 2011?		
Have you or your spouse ever been denied the Earned Income Credit by the IRS?		
Did you buy, sell, or refinance a principal residence or other real property during the tax year?		
Did you receive income from any legal proceedings, cancellation of student loans or other indebtedness during this year?		
Were you a resident of, or did you have income in, more than one state during the year?		
Did you pay any COBRA health coverage continuation premiums?		
Did you make any energy efficient improvements (remodel or new construction) to your home?		
Are you involved in a bankruptcy, foreclosure, re-possession or had any debt (incl. credit card) cancelled?		
Did you or anyone in your family attend college or vocational school during the tax year?		
MISCELLANEOUS INFORMATION		
Has your will or trust been updated within the last three years?		
Do you want any overpayment of taxes applied to next year's estimated taxes?		
Has the IRS or any state or local taxing agency notified you of changes to a prior year's tax return? If yes, provide copies of all notices/correspondence received.		
Were you a beneficiary of an inheritance?		
Do you wish to have $3 (or$6 on joint return) of your taxes applied to the Presidential Campaign Fund?		
Do you wish to Direct Deposit any federal or state refunds? (If yes attach a voided check)		
Did you make any gifts during the year directly or in trust exceeding $13,000 per person?		
Do you want to purchase audit protection?		
Are you expecting a refund or do you expect to owe? _________________ How much? __________		

Notes:

Please choose how you would like to receive your original documents. A copy of the tax return will be supplied in the same manner indicated. We cannot store your original documents for you.

Mail ($10 charge) _________ Secure Upload __________ Pick-Up ___________

____ If you elect secure upload your original documents will be shredded. Please initial here to notate your understanding of this.

____Mailed documents will be sent within one week of verification that your return was accepted.

____If you elect pick-up, you must pick up your documents within 72 hours of being notified that your documents are available. After 72 hours, we will charge you $10 a week for storage.

I certify that I have reviewed this questionnaire and that all answers are true to the best of my knowledge and belief.

____

Name Signature Date