ORGANIZER Page 1 Tax Organizer US 2012 1040 **Tax Return Appointment** Cheryl L. Miranda, CPA 43111 Turf Lane Temecula, CA 92592 Date: Telephone number: (951) 303-6979 Time: Fax number: Location: E-mail address: This tax organizer will assist you in gathering information necessary for the preparation of your 2012 tax return. Please enter all pertinent 2012 information. NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement. NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement. **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 .... In care of ..... Street address..... Apartment number. . Address 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 . . . .

ORGANIZER Page 2

012	1040	US	Tax Organizer			
	i	Plea a governme	ase enter all pertinent 2012 informa ent form for an item, check the box	ation. If you have attached and do not enter a 2012 a	l amount.	
	SES, SALAI oyer name:	RIES AND	TIPS	2012 Amount	2011 Amount	
				EVI E AMOUNT	2011 Amount	
				Attach Forms W-2		
H				Attach Forms W-2		
INTE	REST INC	OME				
	name:					
Н						
				Attach Forms 1099-INT		
DIVII	DEND INCO	OME				
Payer	name:					
Н				Attach Forms 1099-DIV		
П						
Payer	name:		V-2G.	Attach Forms 1099-R & W-2G		
	-	•				
	Form 1099-B Form 1099-M Form 1099-K	- Sales of sto ISC - Miscella - Merchant ca	DRMS - INCOME  ck (also include transaction history)	Attach Forms 1099		
		- State tax re	funds	Attach Forms 1099		
	Form SSA-10 Form 1099-G		ecurity benefits	Attach Forms 1099		
	Form SSA-10		ecurity benefits	Attach Forms 1099		
MISC Other	Spouse: Ali	Alimony receive mony receive	<b>E</b> red			

ORGANIZER Page 3

RETI	REMENT P	AN CON	TRIBUTIONS	2012 Amount	2011 Amount
Тахра	yer: Traditiona	I IRA contrib	outions (1=maximum)		
			s (1=maximum)		
	Self-employe	d, SEP, SIMPLI	E, & qualified plan contributions (1=maximum)		
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ОТЦІ	ED COVEDI	IMENT E			
	THER GOVERNMENT FORMS - DEDUCTIONS  Form 1098-E - Student loan interest				
Form 1098-T - Tuition and related expenses				Attach Forms 1098	
ADJU	<b>JSTMENTS</b>	TO INCO	ME		
Taxpa	-		г		
			nce premiums		
	•		sonal property		
Ot	her adjustmen	ts to income	:: Г	T	
<u>Λ1</u>	imany paid F	ociniont nor	ne & SSN		
All	iiiioiiy palu - P	ecipieni nai	nie & 33N		
 Spous	e:				
Se	elf-employed h	ealth insurar	nce premiums		
Ed	ducator expens	es			
Ex	penses from r	ental of pers	sonal property		
Ot	her adjustmen	ts to income	): 		
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Alı	Alimony paid - Recipient name & SSN				
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MED	ICAL AND [	ENTAL E	XPENSES		
Prescr	ription medicin	es and drug	s		
Doctor	rs, dentists and	d nurses			
Hospit	tals and nursin	g homes			
Insura	nce premiums				
Long-term care premiums - taxpayer					
Long-t	term care pren	niums - spou	use		
Insurance reimbursement					
			portation expenses		
Other:					
TAXE	ES PAID				
		1/12 pavme	ent on 2011 state estimate		
			011 state extension		
			011 state return.		
			<b></b>		
State	income taxes	· paiu ioi pri	or years and/or to other states		

ORGANIZER Page 4

City/local income tax City/local income tax State and local sales Use taxes paid on 20 Use taxes paid on 20 Sales tax on autos n Sales taxes paid on 1 Real estate taxes - p Real estate taxes - p	es - 1/12 pa es - paid wi es - paid wi taxes (exce 112 purchase 111 state ret ot included boats, aircra rincipal resi roperty helo	yment on 2011 city/local estimate th 2011 city/local extension th 2011 city/local return ept autos and special items) ess. urn above above ift, and other special items dence	2012 Amount	2011 Amount
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Personal property INTEREST PAID	5	for investment		
INTEREST PAID				
	y taxes (incl	uding automobile fees in some states)	Attach Tax Notice	
Home mortgage inter				
	est and poi	nts paid:		
<u> </u>			Attach Forms 1098	
┙			711120111 011110 1000	
Home mortgage interest no	t on Form 1098	(include name, SSN, & address of payee):		
D :	F 100			
Points not reported of	n Form 109	8: 		
-				
Mortgago incuranco	oromiume o	n post 12/31/06 contracts		
Investment interest (		•	<u>L</u>	
investment interest (	interest on i	margin accounts).		
CASH CONTRIB  NOTE: No deduction from the done	is allowed f	or cash or check contributions unless the dor the name of the organization, contribution do	nor maintains a bank record, or ate(s), and contribution amount(	a written communication s).
Valuntaar aynanaa	(out of pool	ot)		
•	•	et)		
NONCASH CONT		 NC		
		or contributions of clothing and household ite with minimal monetary value may be denied.	ems that are not in good used co	ondition or better, in addition
MISCELLANEOU	_	i i	Т	
•				
Tax return preparation	n fee			
Safe deposit box ren	tal			
Investment expenses	;			
Estate tax, section 6	91(c)			
Unreimbursed emplo	yee expense	es:		
Other:				
-				
			<u> </u>	