

**SCHNEIDER, LARCHE, HAAPALA & COMPANY, PLLC
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INDIVIDUAL TAX INFORMATION ORGANIZER FOR 2010 RETURN

Personal Information - If you are a new client, please provide copies of last year's tax return.

Name of Taxpayer			SS # - -		
<i>First</i>	<i>M.I.</i>	<i>Last</i>			
Occupation	Date of Birth		Email address		
Address	City		State	Zip	
County	Home phone ()		Work or cell ()		
Are you: legally blind?	Deaf?		Permanently disabled?		
Name of Spouse			SS # - -		
<i>First</i>	<i>M.I.</i>	<i>Last</i>			
Occupation	Date of Birth		Email address		
Address	City		State	Zip	
County	Home phone ()		Work or cell ()		
Are you: legally blind?	Deaf?		Permanently disabled?		

Filing status: Single Married filing jointly Married filing separately Widow(er) Head of household
 Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Names of dependent children <i>First and last</i>	Social Security #	Date of birth	Relationship	Months lived in home in 2010	College Student
	- -				
	- -				
	- -				
	- -				
	- -				

Note: Social Security Number is mandatory (subject to penalty) for each dependent.

Are any children disabled? Yes No Did any children have income above \$950 for the year? Yes No
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent or the child will claim themselves? Yes No

Other dependents or people who lived with you

Name	Social Security #	Date of birth	Relationship	Income
	- -			
	- -			

NOTE - PLEASE ROUND NUMBER TO WHOLE NUMBERS

Income Information

Please bring in all support documentation such as W-2's and 1099's from employers, brokerage houses, mutual funds, banks and credit unions, etc. for the following:

- | | |
|---|--|
| <ul style="list-style-type: none"> • Wages • Interest income – list items separately that have no Form 1099 • Tax exempt interest income received (attach year-end statement) • Dividends • Pensions and IRA's * | <ul style="list-style-type: none"> • Annuities • Unemployment compensation (Form 1099-G) • Social Security (attach Social Security report Form SSA-1099) • Railroad retirement • State income tax refund • Gambling winnings |
|---|--|

* If you have reached the age of 70 ½ during the year, you are required to start withdrawing from retirement plans or you could incur a tax penalty.

Please provide a total amount for (if applicable):

Child Support	\$	Alimony received	\$
Public assistance	\$	Strike benefits	\$
Prizes/award	\$	Scholarships	\$
Education grants	\$	Tips/gratuities not reported on W-2	\$
Veterans disability	\$	Workers compensation	\$
Bartering	\$	Other	\$

If any of the following apply, please attach detail of receipts and expenditures. Contact us if you need additional help:

- Business (Schedule C)
- Rental (Schedule E)
Property address:
- Farm (Schedule F)
- Schedule K-1's of partnerships, S Corporations, trusts, etc.
- Installment sale payments received
Interest \$ Principal \$ Payor Social security #
- Sale or trade of business or investment assets, such as real estate or securities (Form 1099-B must be attached)
We need exact purchase and sale dates and cost including reinvestments, if applicable, to determine the capital gain rate which applies. Electronic spreadsheets can be imported into our tax package. Your statements from your broker (Form 1099-B) sometimes provide the cost/basis information necessary to compute gain or loss. If the statement does not contain this information, you must provide it.

Tax Season Hours: Monday – Thursday 8:00am – 9:00 pm Friday 8:00am – 5:00pm Saturday 8:30am – 4:00pm

Sales and Exchange Worksheet

Description	Purchase date	Cost	Selling date	Sale price
		\$		\$
		\$		\$
		\$		\$
		\$		\$

Retirement Plans

Maximum \$5,000 for 2010 (additional \$1,000 if 50 years or older)

Traditional or Roth IRA (indicate which):		Date made	Amount
Taxpayer			\$
Spouse			\$
If amount listed is not the maximum, do you want to contribute the maximum?			<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you make a retirement plan rollover to a traditional IRA in 2010? If yes, amount			\$
Did you make a traditional IRA rollover to a Roth IRA in 2010? If yes, amount			\$
Do you or your spouse actively participate in an employer plan?		Self: <input type="checkbox"/> Yes <input type="checkbox"/> No	Spouse: <input type="checkbox"/> Yes <input type="checkbox"/> No
Did you make contributions for a self-employed SEP, Simple and/or qualified plan.			\$

Some contributions for 2010 can be made in 2011

Higher Education

Education Savings Account (ESA) - maximum \$2,000 for 2010

Contributions made in 2010	\$	Distributions received in 2010	\$
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Child Care Credit

Child care expenses paid to allow parent to work or go to school (please estimate for each child):

Child's name	Amount
	\$
	\$
	\$
TOTAL - must agree to total paid to all providers listed below	
	\$

The following information is needed for each provider in order to claim the credit:

Provider name	
Address	
Social security or ID number	
TOTAL PAID	\$
Provider name	
Address	
Social security or ID number	
TOTAL PAID	\$
Amount you elected to defer through your payroll to a cafeteria or flex plan for child care in 2010 - should agree to W-2 box 10	
	\$

College Credits and/or Deductions

Qualified tuition and course fees paid for student attending eligible education institutions post high school. Please attach your tuition settlement statements and 1098T's.

<input type="checkbox"/> Yes <input type="checkbox"/> No	Were any children attending college?	Year in college	Paid by You: Tuition \$	Student loan interest \$	Books \$
			Paid by student: Tuition \$	Student loan interest \$	Books \$
	Other expenses:				
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay any tuition for a private school for a dependent child or take classes yourself?				
	Student				Amount paid \$
	Name and address of school				

Quarterly Tax Estimates Paid - Federal and State

	Federal		State	
	Date paid	Amount	Date paid	Amount
1 st quarter 2010				
2 nd quarter 2010				
3 rd quarter 2010				
4 th quarter 2010				
Other:				
TOTAL estimates paid for 2010		\$		\$

State Information

Full-year resident Part-year resident Non-resident

States of residence during 2010:	Dates:
School District:	Did you own or rent your home? <input type="checkbox"/> Own <input type="checkbox"/> Rent

Are you or your spouse a veteran with a service connected disability? % %

Contributions made to:

	Michigan Education Trust	Michigan Education Savings Plan Section 529
Payments made in 2010	\$	\$
Distributions received in 2010	\$	\$

Did you purchase Energy Star rated improvements - Insulation, furnace, water heater, windows, refrigerator, clothes washer or dishwasher? What and how much?

Did you purchase tangible personal property items that you did not pay Michigan sales tax on? Yes No
If yes, now much was spent including shipping and handling? \$

If you are due a refund, would you like it directly deposited into your bank account? Name of bank

Checking <input type="checkbox"/> Savings <input type="checkbox"/>	Routing transit number	Account number
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Ask your tax preparer for information about depositing a refund into an IRA account, or splitting the deposit into more than one account.

Itemized Deductions paid during 2010

Deductions must generally exceed \$5,700 for single; \$11,400 for MFJ; \$8,400 HOH; or \$5,700 MFS to be a benefit.

Medical – Must exceed 7.5% of income to be a deduction

Prescription medicines and drugs	\$	Doctor, dentist, etc	\$
Medical insurance premiums paid	\$	Hospitals	\$
Medicare insurance paid (SSA-1099)	\$	Lab fees	\$
Long-term care insurance premiums	Taxpayer \$	Eyeglasses and contacts	\$
	Spouse \$	Other	\$
Long-term care expense/nursing home	\$		\$
Number of medical miles	at 16.5 cents per mile		
Lodging - limit of \$50 per day per person	\$		
Total insurance and HSA reimbursement if not netted in above figures			\$

Taxes – Do not include taxes paid for full or partial business or rental-use property.

Township/city of residence			
<i>Real estate taxes on personal residence:</i>		<i>Amount</i>	<i>Date paid</i>
Taxable value of residence		\$	
2009 Winter		\$	
2010 Summer		\$	
2010 Winter		\$	
License fees on vehicles			
Other real estate taxes on land, camp, etc:		\$	
<input type="checkbox"/> Yes <input type="checkbox"/> No Did you keep receipts for sales tax paid during 2010?		Amount	\$
<input type="checkbox"/> Yes <input type="checkbox"/> No Did you purchase a car, plane, boat, motorcycle or home in 2010?		Was it new or used?	
Sales tax paid \$	Purchase paid \$	Date	/ /

Charitable

Cash to church and charities *	\$
Noncash contribution - Fair market value of items given	\$
<i>If over \$500, provide details of contributions. Items must be in good used condition or better</i>	
Out-of-pocket expenses for charities	\$
Michigan food banks or homeless shelters **	\$
Michigan colleges or universities **	\$
Michigan community foundations **	\$
Foundation name	
Charitable miles (14 cents per mile)	
Did you transfer funds from an IRA directly to a charity	<input type="checkbox"/> Yes <input type="checkbox"/> No

* Rules require the taxpayer retain documentation for ALL cash contributions and acknowledgement from charity of a \$250 or more donation to a single charity in one day.

** For Michigan tax credits – do not include in total above

Interest Expense**Residential interest***Principal residence and one vacation residence (boat or recreational vehicle with living accommodations)*

House mortgage paid to financial institution (attach Form 1098 received from lender)	\$
Home equity or home improvement loan	\$
Mortgage insurance premiums paid (PMI)	\$
House mortgage or contract paid to individual:	\$

Name _____ Social Security # _____

Address _____

New mortgage or refinance? _____ For how many payments? _____ Date / /

Points Paid

To refinance a mortgage or purchase a new residence – please bring in closing papers \$

Investment Interest - i.e. on debt to carry stocks, bonds or investments:

List: \$

\$

Student loan interest – deduction paid for taxpayers and dependents by taxpayer

\$2,500 maximum per year – Income limits apply \$

Casualty and Theft Loss

If you suffered any sudden, unexpected damage or loss of property or a theft, provide details to your preparer

Miscellaneous Deductions - Attach detail if applicable

Union, business and professional dues including work assessments	\$
Professional subscriptions	\$
Uniform and protective clothing – not deductible if adaptable for everyday wear	\$
Work tools – small tools, repairs, etc.	\$
Teaching expenses - supplies, books, etc.	\$
Education expenses associated with your job – books, travel etc.	\$
Travel between jobs or to a temporary job *	# of miles
Other business expenses:	\$
Tax preparation fees	\$
IRA fees – paid separately	\$
Safe deposit box rent	\$
Gambling losses	\$

Deductible only up to the amount of gambling winning reported. A log must be kept to verify losses.

Other deductions or questions

* Auto expenses will not be allowed by IRS without adequate written records or sufficient evidence supporting business use. Daily records provide the best protection in case of an audit. Please provide us with total mileage, commuting mileage and business mileage by vehicle. We do have log books available for your use.

Adjustments Worksheet

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$250 each (\$500 joint)	\$
Are you covered by a Health Savings Account (HSA)? Amount of deductible contributions	\$
Self-employed SEP, Simple, and qualified plans. Some contributions for 2010 may be made in 2011.	\$
Self-employed health insurance deduction. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	\$
Penalty on early withdrawal of savings.	\$
Student loan interest deduction. Paid for taxpayers and dependents. Income limits apply.	
Tuition and fees deduction. Qualified tuition and fees if not claiming education credits. Income limits apply.	
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Some contributions for 2010 may be made in 2011.	\$
Moving expenses. Job-related move and at least 50 mile increase in commuting distance.	Ask preparer
Business expenses of reservists, performing artists, and fee-based government officials.	Ask preparer

Questions To Be Discussed During Your Tax Return Interview:**Miscellaneous Questions**

<input type="checkbox"/> Yes <input type="checkbox"/> No	Have you received any notice from the IRS or state revenue department within the past year?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you buy or sell a home in 2010? <input type="checkbox"/> Bought <input type="checkbox"/> Sold: Purchase date / / (Provide closing statement)
<input type="checkbox"/> Yes <input type="checkbox"/> No	If you sold a home, did you claim the first-time homebuyer credit when it was purchased? If yes, provide details.
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any children who earned more than \$1,900 of investment income?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Will there be any significant changes in income or deductions next year, such as retirement?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have any uninsured loss to your property in 2010?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you sell or transfer any stock or sell rental or investment property?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive any income from an installment sale?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you own a business or an interest in a partnership, corporation, LLC, or other venture?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Have you paid alternative minimum tax (AMT) in previous years?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you granted, or did you exercise, any employer stock options during 2010?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you engage in any farming activities?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you purchase a new energy-efficient car, truck, or van?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you make any new energy-efficient improvements to your home? If yes, provide details.
<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you involved in bankruptcy, foreclosure, repossession proceedings or had any debt (including credit cards) cancelled?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Were you a citizen of or live in a foreign country, or receive income from a foreign investment or bank account?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a member of the Military?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay or receive any alimony?
	Name of recipient/payee
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you wish to allocate \$3 to the Presidential Election Campaign (does not affect refund)?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you make gifts of more than \$13,000 any individual? Amount paid/received \$
<input type="checkbox"/> Yes <input type="checkbox"/> No	Would you like the IRS and State discuss your tax return w your tax preparer if any questions should arise? Social security #
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have any investments become worthless or uncollectible bad debts? If yes, provide details.
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you incur any expenses in 2010 or prior years associated with the adoption of a child?
	If yes: amount \$
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive any tips during the year?
	If yes: were all of your tips reported to your employer?
<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay anyone for domestic services in your home?

Contact Us

There are many events that occur during the year that can affect your tax situation. Preparation of your tax return involves summarizing transactions and events that occurred during the prior year. In most situations, treatment is firmly established at the time the transactions occur. However, negative tax effects can be avoided by proper planning. Please contact us in advance if you have questions about the tax effects of a transaction or event, including the following:

- | | |
|--|---|
| • Pension or IRA distributions | • Sale or purchase of a residence or other real estate |
| • Significant change in income or deductions | • Retirement |
| • Job change | • Notice from IRS or other revenue department |
| • Marriage | • Divorce or separation |
| • Attainment of age 59 ½ or 70 ½ | • Self-employment |
| • Sale or purchase of a business | • Charitable contributions of property in excess of \$5,000 |

To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information for the preparation of this year's income tax returns for which I have adequate records.

Signature	Date
Signature	Date