Corwin & Jenkins, CPAs
35000 Chardon Road, Suite 100
Willoughby Hills, OH 44094
Phone 440-954-3399 Toll Free 1-800-520-5602
Email: cpa@corwinjenkins.com

MANDATORY GENERAL QUESTIONS:

Your Name____________________________________ DOB _______________(MANDATORY)
Your Occupation ______________________________

Spouse Name__________________________________ DOB _______________(MANDATORY)
Spouse Occupation ______________________________

Marital Status
as of 12-31-11: ❍ Single ❍ Married ❍ Divorced ❍ Legally Separated ❍ Widowed

Exact City of Residence _________________________________(NOT YOUR MAILING ADDRESS)
Is this a Township? ______________________________
School District Name ______________________________
If you moved during the year, when did you move? ______________________________

What is your email address? ____
Daytime Phone # _________________ Evening Phone #______________ Cell Phone #_____________
Which is the best way to reach you? ______________________________

Do you authorize us to discuss this return with IRS? ❍ Yes ❍ No

When your taxes are done, you would like to:
- ❍ Pick them up
- ❍ Have them mailed to you
- ❍ Schedule a meeting to discuss results
- ❍ Other

We are required to provide you with copies of your tax returns. What format do you prefer?
- ❍ Hard Copy
- ❍ PDF on Web Server (Adobe Format)

IMPORTANT QUESTIONS:

Yes

- ❍ Can you be claimed as a dependent by another taxpayer for 2011?
- ❍ Do you want to allocate $3 to the Presidential Election Campaign Fund? ❍ Spouse?
- ❍ Do you want to allocate $1 to the Ohio Political Party Fund? ❍ Spouse?
- ❍ Were there any changes in dependents from the prior year? List additions or deletions:

  Full Name____________________ DOB__________ SS#__________
  Full Name____________________ DOB__________ SS#__________

- ❍ Do you have any physically or mentally disabled children?
- ❍ Were any of your dependent children 19 years of age or older at the end of 2011? If yes, were they full time students? Were all of your students under age 24?
- ❍ Did you have any children under age 19 on January 1, 2012 with interest and dividend income or capital gains totaling in excess of $950?
- ❍ Did you have any financial assets in a foreign country, such as a bank account, securities account, or rental property?
- ❍ Did you transfer your home or other property to your child or other family member in 2011?
- ❍ Did you or your spouse make any gifts to an individual that totaled $13,000 or more?
- ❍ Did you refinance your home in 2011? If so, what were the proceeds used for?
- ❍ If you will be receiving a refund, would you like it directly deposited into your checking, savings, or IRA account or a combination of the three? If your ***DIRECT DEPOSIT*** information is not the same as last year we need a voided check or the information below:

  Bank Name ______________________________

  Routing Number ______________________________

  Account Number ______________________________

  Type of Account *(CIRCLE ONE)* ***Checking*** ***Savings*** ***IRA***

IMPORTANT INCOME QUESTIONS:

Yes **INCOME - Mark if you had . . .**

- ❍ Wages (attach all W-2s)
- ❍ Interest or dividend income (attach all 1099s)
- ❍ Alimony income
- ❍ Business income (attach sales and expense summary from sole proprietorship)
- ❍ Any income or payments received through credit card transactions from your customers (attach 1099-Ks)
- ❍ Stock sales (attach broker 1099 package) **Remember, in 2012 your broker will begin to match purchases and sales for you.**
- ❍ IRA, pension, annuity income, or other retirement income (attach all 1099-Rs)
- ❍ Rental or royalty income
- ❍ Partnership or S Corporation income (attach all K-1s)
- ❍ Estate or trust income (attach all K-1s)
- ❍ Unemployment compensation (attach Form 1099-G)
- ❍ Social Security benefits or disability income (attach Form SSA-1099)
- ❍ Unreported tip income of $20 or more in any month
- ❍ Gambling winnings (attach Form W-2G)
- ❍ Received a distribution from an Education Savings Account or a Qualified Tuition Program (529 Plan) as recipient? as donor?
- ❍ Any other income not mentioned above (please provide all relevant supporting documentation)

IMPORTANT DEDUCTION QUESTIONS:

Yes **DEDUCTIONS & CREDITS - Mark if you had . . .**

❍ Paid alimony (please include recipient's Social Security #).
SS# ____________________ Amount Paid ____________

❍ Did you make an IRA contribution for 2011?
If YES...How much? _____________
If you haven't let us know, there is still time but **it MUST be made by 4/17/12.**

❍ Paid student loan interest (attach Form 1098-E)

❍ Paid tuition expenses that are required to attend college, university, or vocational school (attach Form 1098-T)

❍ Made contributions to a college tuition Sec. 529 Plan (attach paper work)

❍ Had medical expenses for 2011 (attach a list of what you paid)

❍ Paid health insurance or long-term care premiums (attach list of payments)

❍ Paid real estate taxes. How much? ______________ Principal Residence?
How much? ______________ Vacation Home?

❍ Paid mortgage interest, home equity interest or PMI (attach Form 1098)

❍ Made charitable contributions. Provide a list of recipients. Remember, IRS requires you to keep both cancelled checks and thank you letters from charity.

❍ Gave non-cash contributions. If over $500 value, please provide us with receipts.

❍ Had gambling losses (attach win/loss statement from casino).

❍ Incurred Child Care costs (MANDATORY INFORMATION NEEDED)
Child Care Provider ____
ID # ______________ Amount Paid ______________
Address ____
____

❍ Used your car on the job for which you were not reimbursed. If so, we need:
Business miles: Jan 1 - June 30 ______________
Business miles: July 1 - Dec 31 ______________
Total miles: Jan 1 - Dec 31 ______________

❍ Any other deductions or credits not mentioned above that you want us to consider. (please provide all relevant supporting documentation)

ESTIMATED TAX QUESTIONS:

If you have made any estimated tax payments for 2011, please fill in the dates and amounts below:

	Federal		State		City	
	Date	Amt	Date	Amt	Date	Amt
Last 2010 Payment made in 2011	______	______	______	______	______	______
1st 2011 Estimate	______	______	______	______	______	______
2nd 2011 Estimate	______	______	______	______	______	______
3rd 2011 Estimate	______	______	______	______	______	______
4th 2011 Estimate	______	______	______	______	______	______
Total Paid for 2011	______	______	______	______	______	______

Yes

❍ If you have an overpayment of 2011 taxes, do you want the excess applied to your 2012 estimated tax (instead of being refunded)?

❍ Do you expect your 2012 taxable income and withholdings to be different than 2011?

*** * Please note if you receive additional information after sending us your information there WILL be a reprocessing fee.**