PRIVACY POLICY

CPAs, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization.

PARTIES TO WHOM WE DISCLOSE INFORMATION

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees and, in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT AND FORMER CLIENTS' INFORMATION

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

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Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Topic Index

Tax Organizer Legend:

Throughout the tax organizer, you will find columns with the heading "TSJ".
TSJ Codes - Enter "T" for taxpayer, "S" for spouse or "J" for joint.

For any question answered Yes, please attach supporting detail or documents.

	Yes	No
Personal Information:		
Did your marital status change during 2010?		
If married, do you and your spouse want to file separate returns?		
Did your address change during 2010?		
Can you or your spouse be claimed as a dependent by another taxpayer?		
Dependents:		
Were there any changes in dependents from the prior year? Note: Including non-child dependents for whom you provided more than half the support		
Did you pay for child care while you worked or looked for work?		
Do you have any children under age 18 with unearned income more than $950?		
Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than $950?		
Did you adopt a child or begin adoption proceedings during 2010?		
Purchases, Sales and Debt:		
Did you have any debts canceled, forgiven or refinanced during 2010?		
Did you start a new business, purchase a new rental property, farm or acquire any new interest in any partnership or S corporation during 2010?		
Did you sell an existing business, rental property, farm or any existing interest in a partnership or S corporation during 2010?		
Did you sell, exchange or purchase any real estate in 2010? If so, please attach closing statements		
Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?		
Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan?		
Did you pay any student loan interest in 2010?		
Are your total mortgages on your first and/or second residence greater than $1,000,000? If so, please provide the principal balance and interest rate at the beginning and the end of the year.		
Did you have an outstanding home equity loan at the end of 2010? If so, please provide the principal balance and interest rate at the beginning and end of the year		
Did you take out a home equity loan in 2010?		
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?		
Did you engage in any put or call transactions? If Yes, please provide details.		
Did you close any open short sales during 2010?		
Did you sell any securities not reported on your Form 1099-B?		

Itemized Deductions:

	Yes	No
Did you contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?		
Did you incur any casualty or theft losses during the year?		
Did you make any large purchases, such as motor vehicles and boats?		
Did you incur any casualty or loss attributable to a federally declared disaster?		

Miscellaneous:

	Yes	No
Did you or your spouse have any transactions pertaining to a medical savings account (MSA) during 2010? If you received a distribution from an MSA, please include Form 1099-SA		
Did you or your spouse have any transactions pertaining to a health savings account (HSA) during 2010? If you received a distribution from an HSA, please include Form 1099-SA		
Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?		
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity or deferred compensation plan?		
Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?		
Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)? If Yes, include Form 1099-Q		
Did you or your dependents incur any post-secondary education expenses, such as tuition?		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? If Yes, how many months were you covered? Months: ____		
Did you move to a different home because of a change in the location of your job?		
Did you pay in excess of $1,000 in any quarter, or $1,700 during the year for domestic services performed in or around your home to individuals who could be considered household employees?		
Did you receive unreported tip income of $20 or more in any month of 2010?		
Did you or your spouse receive distributions from long-term care insurance contracts? If Yes, please include Form 1099-LTC		
Were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account or other financial account in a foreign country?		
Did you create or transfer money or property to a foreign trust?		
Did you purchase a new "hybrid", or alternative technology vehicle, including a qualified plug-in electric drive motor vehicle in 2010?		
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year?		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?		
Were you notified by the IRS or other taxing authority of any changes in prior year returns?		
Did you lose your job during 2010 because of foreign competition and pay for your own health insurance?		
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?		
Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters?		
Have you been an identity theft victim and have you contacted the IRS? If Yes, please furnish the 6-digit identity protection personal identification number issued to you by the IRS ________		

Miscellaneous: (continued)

	Yes	No
Did you engage in any bartering transaction?		
Did you make gifts of more than $13,000 to any individual?		
Did you have any foreign income or pay any foreign taxes during 2010?		

Severance/Retirement:

	Yes	No
Did you retire or change jobs in 2010?		
Did you receive deferred, retirement or severance compensation?		

If Yes, enter the date received (Mo/Da/Yr). Date: ______

	Yes	No
Did you or your spouse turn age 70 1/2 during the year and have money in an IRA or other retirement account while not taking a distribution?		

Sale of Your Home:

	Yes	No
Did you sell your home in 2010?		
If Yes, did you own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?		
Did you ever rent out this property?		
Did you ever use any portion of the home for business purposes?		
Have you or your spouse sold a principal residence within the last two years?		

At the time of the sale, the residence was owned by the: ☐ Taxpayer ☐ Spouse ☐ Both

Additional Information:

	Yes	No
For any trust you created or that you are trustee, have any beneficiaries died during 2010?		
Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2010?		

If Yes, enter the following:

Name of Designated Beneficiary	Social Security Number	State Sponsoring Plan	Account Number	2010 Amount Contributed

Personal Information, Dependent(s) and Wages

Taxpayer:

First Name and Initial | Last Name | Social Security Number

Occupation | Date of Birth (Mo/Da/Yr) | Date of Death (Mo/Da/Yr)

Daytime/Work Telephone Number | Evening/Home Telephone Number | Cell Phone Number | Fax Number

Primary Email Address | Secondary Email Address

Spouse:

First Name and Initial | Last Name | Social Security Number

Occupation | Date of Birth (Mo/Da/Yr) | Date of Death (Mo/Da/Yr)

Present Mailing Address:

Street Address | Apartment Number

City | State | ZIP code

Foreign Country

	Yes	No
May the IRS or other taxing authority discuss the return with the preparer?		
Is the taxpayer claimed as a dependent on someone else's tax return?		

	Taxpayer		Spouse	
	Yes	No	Yes	No
Are you considered legally blind per IRS regulations?				
Do you want to contribute to the Presidential Election Campaign Fund?				

Dependent Information:

Did dependent have income over $3,650?

First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Relationship to Taxpayer	Months Lived in Your Home	X if Disabled	Yes or No

Please provide the name of any person living with you who is claimed as a dependent on someone else's tax return

Please list the years that a release of claim to exemption is given for a dependent child not living with you

Wages and Salaries:

Please enclose all copies of your current year Forms W-2

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER1	Medicare	State	Local

Electronic Filing

Electronic Filing: **Please enclose all copies of your current year Forms W-2**

Electronic filing is the means by which your return is transmitted directly to the IRS. The IRS has implemented an electronic filing mandate requiring certain preparers to file all returns that they prepare electronically. Some states also require certain preparers to electronically file state returns prepared. The IRS and some states allow taxpayers to elect not to file their returns electronically.

	Yes	No
Do you want to elect not to electronically file your federal return?	☐	☐
Do you want to elect not to electronically file your state return?	☐	☐
If Yes and filing more than one state return, does election apply to all states?	☐	☐

The IRS requires the use of a 5-digit self-selected Personal Identification Number (PIN) in lieu of mailing a signature document when electronically filing.

Would you like to use a randomly generated PIN?	Yes	No
Taxpayer	☐	☐
Spouse	☐	☐

If No, please enter a 5-digit self-selected PIN:

Taxpayer PIN ______________

Spouse PIN ______________

Direct Deposit and Withdrawal

Direct Deposit and Electronic Withdrawal Account Information:

The IRS and certain states allow refunds to be deposited directly into your financial institution account, regardless of the means used to file the return For balance due returns to be filed electronically, the IRS and many states allow the entire amount due to be paid using electronic withdrawal. If you would like to have your refund deposited directly into your account or pay a balance due by using an electronic withdrawal, please complete the following information

(To properly file your return, please attach a voided check or a copy of a monthly statement for your account.)

Owner of account ☐ Taxpayer ☐ Spouse ☐ Joint

Select type of account ☐ Checking ☐ Trad. Savings ☐ IRA Savings ☐ HSA Savings ☐ Archer MSA Savings ☐ Coverdell Ed Savings

Name of financial institution ______

Financial Institution Routing Transit Number (if known) ______
(Use the routing number from a check, NOT a deposit slip. They can be different
The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number ______

	Yes	No
Do you want your refund deposited directly into your financial institution account?	☐	☐
If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?	☐	☐

What amount do you want withdrawn if not the entire balance due? ☐

What date do you want the withdrawal done? (Mo/Da/Yr) ______

Owner of account ☐ Taxpayer ☐ Spouse ☐ Joint

Select type of account ☐ Checking ☐ Trad. Savings ☐ IRA Savings ☐ HSA Savings ☐ Archer MSA Savings ☐ Coverdell Ed Savings

Name of financial institution ______

Financial Institution Routing Transit Number (if known) ______
(Use the routing number from a check, NOT a deposit slip. They can be different.
The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number ______

	Yes	No
Do you want your refund deposited directly into your financial institution account?	☐	☐
If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?	☐	☐

What amount do you want withdrawn if not the entire balance due? ☐

What date do you want the withdrawal done? (Mo/Da/Yr) ______

Interest Income

Interest Information:

Please enclose copies of all Forms 1099-INT or other documents for interest received

Tax-Exempt Interest Code: 1 - 1099-INT 2 - Private Activity Bond 3 - Both

TSJ	Name of Payer	Savings & Loans, Bank and Other	U.S. Bonds and Obligations	Code	Tax-Exempt Interest	2009 Interest Amount
	Total					

Seller-Financed Mortgage Interest Information:

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	2010 Interest Amount	2009 Interest Amount

Address of Individual to Whom Mortgage Interest Was Paid

Enter Any Additional Information:

Note: Please list all items sold during the year on Form 7.

Dividend Income

Dividend Information:

Please enclose copies of all Forms 1099-DIV or other documents for dividends received

TSJ	Name of Payer	Box 1a Total Ordinary Dividends	Box 1b Qualified Dividends	Box 2a Total Capital Gain Distribution	U S Bond Interest Amount or Percent in Box 1a	2009 Gross Dividends Amount
	Total					

Enter Any Additional Information:

Note: Please list all items sold during the year on Form 7.

Business Income and Cost of Goods Sold

Name of Business: ____________________

Principal Business or Profession: ____________________

TSJ ____
Employer ID number ____________
Street address ____________________
City, state and ZIP code ____________________
Method of inventory ____________________
Method of accounting ____________________

Business Questions for 2010:

	Yes	No
Did you dispose of this business?		
If Yes, what was the disposition date? (Mo/Da/Yr) ____________		
Was there a change in determining quantities, costs or valuations between opening and closing inventory?		
Were you involved in the operations of this business on a regular, continuous and substantial basis?		

	2010 Amount	2009 Amount
Health insurance premiums paid for yourself and your dependents		

Income:

	2010 Amount	2009 Amount
Gross receipts or sales		
Less returns and allowances		

Cost of Goods Sold:

	2010 Amount	2009 Amount
Beginning inventory		
Purchases less cost of items withdrawn for personal use		
Cost of labor (do not include amounts paid to yourself)		
Materials and supplies		

Other Costs of Cost of Goods Sold:

Description	2010 Amount	2009 Amount
Ending inventory		

Other Income:

Description	2010 Amount	2009 Amount

Business Expenses and Property & Equipment

Name of Business: ______________________

Principal Business or Profession: ______________________

Expenses:

	2010 Amount	2009 Amount
Advertising		
Car and truck expenses		
Parking fees and tolls		
Commissions and fees		
Contract labor		
Employee benefit programs and health insurance (other than pension and profit-sharing plans)		
Insurance (other than health)		
Interest - mortgage (paid to banks, etc.)		
Interest - other		
Legal and professional fees		
Office expense		
Pension and profit-sharing plans		
Rent or lease - vehicles, machinery and equipment		
Rent or lease - other business property		
Repairs and maintenance		
Supplies (not included in Cost of Goods Sold)		
Taxes and licenses		
Travel		
Meals and entertainment		
Utilities		
Wages		
Dependent care benefits		

Other Expenses:

Description	2010 Amount	2009 Amount

Property and Equipment:

Please attach a list if more space is needed

X if not new	Acquisitions - Description	Date Acquired (Mo/Da/Yr)	Cost

Dispositions - Description	Date Acquired (Mo/Da/Yr)	Cost	Date Sold (Mo/Da/Yr)	Selling Price

Sales of Stocks, Securities, Capital Assets & Installment Sales

Gains or Losses from Sales of Stocks, Securities and Other Capital Assets:

Please enclose all Forms 1099-A, 1099-B, 1099-S and copies of mutual fund statements for the year

Did you have any of the following during the year?	Yes	No
Mutual fund transactions		
Exchange of any securities or investments for something other than cash		
Sales of inherited property		
Sales of any stock or stock options at a loss and purchases of the same or substantially similar stock or options 30 days before or 30 days after the sale		
Commodity sales, short sales or straddles		
Reinvestment of the proceeds of the sale of a publicly traded security into an SSBIC interest		
Reinvestment of the proceeds of the sale of qualified small business stock in other qualified small business stock		
Debts that became uncollectible		
Securities that became worthless		
Sale of any property where you will receive payments in future years		

TSJ	Kind of Property and Description	Gross Sales Price (Less Commissions)	Cost or Other Basis	Date Acquired (Mo/Da/Yr)	Date Sold (Mo/Da/Yr)	Federal Tax Withheld

Installment Sales: **Do not include interest received in principal amount**

TSJ	Property Description	Date Sold (Mo/Da/Yr)	2010 Principal Received	2009 Principal Received

IRA, Pension, Annuity and Retirement Plan Information

Individual Retirement Account (IRA):

TS ______
Name of payer ______

IRA Questions for 2010:

	Yes	No
Are you covered by an employer's retirement plan?		
If no, is your spouse covered by an employer's retirement plan?		
Do you want to limit your IRA contribution to the maximum amount deductible on your tax return?		
If no, do you want to contribute the maximum allowable amount to your IRA even though you may not qualify for an IRA deduction?		
Did you receive distributions in 2010 from a traditional IRA, Roth IRA or Qualified Education Account?		
Did you convert a traditional IRA to a Roth IRA in 2010?		
Did you use your IRA as security for a loan this year?		
Did you have any transactions with your IRA during the year?		

If Yes, please explain. ______

IRA Values, Rollovers, and Distributions: Please enclose copies of all Forms 1099-R

Total value of all traditional IRAs on December 31, 2010	
Outstanding rollovers on December 31, 2010	
IRA distributions received during 2010	
Total distributions converted to Roth IRAs	
Total retirement plans converted to Roth IRAs	

Contributions: Please enclose copies of all Forms 5498

IRA:

Contributions in 2010 for the 2010 tax return	
Contributions in 2011 for the 2010 tax return	
Amount for 2010 you choose to be treated as nondeductible	

Roth IRA:

Contributions made for the 2010 tax year	

Pensions and Annuities: Please enclose all Forms 1099-R and any nontaxable distribution details

TSJ	Name of Payer	2010 Gross Distributions	Taxable Amount	Federal Tax Withheld	State Tax Withheld	Is this a Rollover?	Is this a IRA?	2009 Gross Distributions

Self-Employed Retirement Plan: Please enclose copies of all Forms 1099-R

	Taxpayer Yes	Taxpayer No	Spouse Yes	Spouse No
Have you established a self-employed retirement or SIMPLE plan with deductible contributions?				
Do you want to contribute the maximum amount allowed?				

Contributions to:	Taxpayer 2010 Amount	Spouse 2010 Amount
Simplified employee pension plan		
Defined benefit plan		
Defined contribution plan		
SIMPLE plan		

Rental and Royalty Income and Expenses

Location of Property: ______________________

TSJ ____
Type of property ______________________

	2010	2009
Ownership percentage if not 100%	%	
How many days was this property rented at fair market value?		
How many days was this property used personally (including use by family members)?		

Income:

	2010 Amount	2009 Amount
Rents received		
Royalties received		

Other Income:

Description	2010 Amount	2009 Amount

Expenses:

	2010 Amount	2009 Amount
Advertising		
Auto and travel		
Cleaning and maintenance		
Commissions		
Insurance		
Legal and other professional fees		
Management fees		
Mortgage interest paid to banks, etc		
Mortgage interest paid to individuals		
Other interest		
Repairs		
Supplies		
Taxes		
Utilities		
Dependent care benefits		

Other Expenses:

Description	2010 Amount	2009 Amount

Miscellaneous Income, Adjustments and Alimony

Please enclose Forms: W-2G, 1099-MISC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC, 1099-G and 1098-E

Miscellaneous Income and Adjustments:

	TSJ ____		TSJ ____	
	2010 Amount	2009 Amount	2010 Amount	2009 Amount
Taxable pensions and annuities received				
Nontaxable pensions and annuities received				
Federal withholding on pensions and annuities				
State withholding on pensions and annuities				
Unemployment compensation received				
Unemployment compensation repaid in 2010				
Social security benefits received				
Social security benefits repaid in 2010				
Medicare premiums withheld				
Tier 1 railroad retirement benefits received				
Tier 1 railroad retirement benefits repaid in 2010				
Taxable IRA distributions				
Nontaxable IRA distributions				
Total lump sum social security received				
Lump sum taxable social security				
Other federal withholding				
Other state withholding				
Economic recovery payment received in 2010				

State and Local Income Tax Refunds:

TSJ	State	City	Tax Year	Income Tax Refund	
				State	Local

Other Income:

TSJ	Nature and Source	2010 Amount	2009 Amount

Alimony Paid or Received:

TSJ	Recipient's Name	Recipient's Social Security No.	Alimony Received?	2010 Amount	2009 Amount

Miscellaneous Adjustments

Educator Expenses: **Deduction for amounts paid by educators of kindergarten through Grade 12**

TS	2010 Amount	2009 Amount

Health Savings Accounts (HSAs)

TS	Description	2010 Amount	2009 Amount
	Contributions made for 2010		
	Distributions received from all HSAs in 2010		

	Yes	No
Were all distributions from your HSA for unreimbursed medical expenses?		
Did you or your spouse enroll in Medicare?		
If yes, what month did you enroll?		
What month did your spouse enroll?		

Other Adjustments to Income: **Please enclose all Forms 1098-E for Student Loan Interest Paid**

TSJ	Nature and Source	2010 Amount	2009 Amount

Itemized Deductions - Medical and Taxes

Medical and Dental Expenses:

	TSJ	2010 Amount	2009 Amount
Prescription medicines and drugs			
Total medical insurance premiums paid (Do not include medicare premiums paid)			
Long-term care expenses			
Total insurance reimbursement			
Number of miles traveled for medical care			
Lodging			
Doctors, dentists, etc			
Hospitals			
Lab fees			
Eyeglasses and contacts			
Cobra assistance premiums in 2010			

	2010 Amount	2009 Amount
Taxpayer long-term care insurance premiums paid		
Spouse long-term care insurance premiums paid		

Other Medical Expenses:

TSJ	Description	2010 Amount	2009 Amount

Taxes Paid: Please include copies of your tax bills

	TSJ	2010 Amount	2009 Amount
Personal property taxes paid (include vehicle taxes)			
General sales taxes paid on specified items			

Itemize real estate taxes by state

TSJ	Real Estate Taxes	2010 Amount	2009 Amount

Other Taxes Paid:

TSJ	Description	2010 Amount	2009 Amount

If you purchased or sold your home in 2010, did you include any taxes from your closing statement in the amounts above? ☐ Yes ☐ No

Itemized Deductions - Mortgage Interest and Points

Mortgage Questions for 2010:

	Yes	No
If you purchased or sold your home, did you include any mortgage interest from your closing statement in the amount below?		
Did you refinance your home? (If Yes, please enclose the closing statement)		
If Yes, how many years is your new mortgage loan? ________		
Did you purchase a new home or sell your former home during the year?		
If Yes, please enclose the closing statements from the purchase and sale of your new and former homes.		
If Yes, also, did you (or your spouse, if married) have an ownership interest in a principal residence in the US during the 3 year period prior to the purchase of this home?		
If Yes, did you (and your spouse, if married at the time of purchase) own and use the same home as a principal residence in the U.S. for any 5 consecutive year period during the 8 year period ending on the purchase date of the new home?		

Home Mortgage Interest Paid To Financial Institutions:

TSJ	Paid To	Did You Receive Form 1098?		2010 Amount	2009 Amount
		Yes	No		

Other Home Mortgage Interest Paid:

TSJ	Paid To		ID Number	2010 Amount	2009 Amount
	Name	Address			

Deductible Points:

TSJ	Paid To	Did You Receive Form 1098?		2010 Amount	2009 Amount
		Yes	No		

Mortgage Insurance Premiums:

Premiums paid or accrued for qualified mortgage insurance.

TSJ	2010 Amount	2009 Amount

Investment Interest Expense:

Interest paid on money you borrowed that is allocable to property held for investment

TSJ	Paid To	2010 Amount	2009 Amount

Cash Contributions:

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than $500 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity. Attach Forms 1098-C received from the charity.

TSJ	Organization or Description of Contribution	2010 Amount	2009 Amount

TSJ	Conservation Real Property	2010 Amount	2009 Amount
	100% limit		
	50% limit		

TSJ	Description	2010 Miles	2009 Miles
	Number of miles traveled performing volunteer work for qualified charitable organizations		

Noncash Contributions Totaling Less Than or Equal to $500:

TSJ	Description of Donated Property	2010 Amount	2009 Amount

Noncash Contributions Totaling More Than $500:

TSJ . . . . ____

Description of the donated property . . . . ____________________

Donee organization name . . . . ____________________

Donee organization address . . . . ____________________

Date the property was acquired by the taxpayer . . (Mo/Da/Yr) __________

Date the property was donated . . . . (Mo/Da/Yr) __________

Cost or basis of the donated property . . . . [ ]

Fair market value of the donated property . . . . [ ]

Which of the following methods was used to determine the fair market value? CAUTION: Generally, contributions in excess of $5,000 of similar property will require an appraisal (does not apply to marketable securities)

☐ Appraisal ☐ Thrift shop value ☐ Catalog ☐ Comparable sale

Other - please explain . . . . ____________________

Which of the following describes how this donated property was acquired?

☐ Purchase ☐ Gift ☐ Inheritance ☐ Exchange

Federal Tax Payments

Refund Application:

If you have an overpayment of 2010 taxes, do you want the excess:

Refunded	☐	Yes	☐	No
Applied to your 2011 estimated tax liability	☐	Yes	☐	No

Federal Estimated Tax Payments:

		Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2010 1st Quarter Estimate	(Due 04-15-2010)			
2010 2nd Quarter Estimate	(Due 06-15-2010)			
2010 3rd Quarter Estimate	(Due 09-15-2010)			
2010 4th Quarter Estimate	(Due 01-18-2011)			

2009 overpayment applied to 2010 estimate ☐

Tax Planning Information for Tax Year 2011:

Do you expect any of the following to occur in 2011?

	Yes	No
A change in your marital status	☐	☐
A change in the number of your dependents	☐	☐
A substantial change in your income	☐	☐
A substantial change in your withholding	☐	☐
A substantial change in deductions	☐	☐

If you answered Yes to any of the above questions, please provide details.

State and City Tax Payments

20A

State and City Estimated Tax Payments:

TSJ ___
State/City ___

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2010 1st Quarter Estimate			
2010 2nd Quarter Estimate			
2010 3rd Quarter Estimate			
2010 4th Quarter Estimate			

2009 overpayment applied to 2010 estimate

Balance of prior year(s)' tax paid in 2010 plus amount paid with 2009 extensions

Estimated tax payments for 2009 paid in 2010

State and City Estimated Tax Payments:

TSJ ___
State/City ___

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2010 1st Quarter Estimate			
2010 2nd Quarter Estimate			
2010 3rd Quarter Estimate			
2010 4th Quarter Estimate			

2009 overpayment applied to 2010 estimate

Balance of prior year(s)' tax paid in 2010 plus amount paid with 2009 extensions

Estimated tax payments for 2009 paid in 2010

State and City Estimated Tax Payments:

TSJ ___
State/City ___

	Amount Due	Date Paid if Not Date Due (Mo/Da/Yr)	Amount Paid
2010 1st Quarter Estimate			
2010 2nd Quarter Estimate			
2010 3rd Quarter Estimate			
2010 4th Quarter Estimate			

2009 overpayment applied to 2010 estimate

Balance of prior year(s)' tax paid in 2010 plus amount paid with 2009 extensions

Estimated tax payments for 2009 paid in 2010

Colorado Information

Residency Information:

	Taxpayer From (Mo/Da/Yr)	Taxpayer To (Mo/Da/Yr)	Spouse From (Mo/Da/Yr)	Spouse To (Mo/Da/Yr)
If you did not live in Colorado for all of 2010, enter the dates you did live in Colorado				
Enter the state names other than Colorado where you had income				

Voluntary Contributions:

Enter the amount you wish to contribute on your 2010 tax return to:

Nongame and Endangered Wildlife Cash Fund	
Colorado Domestic Abuse Program Fund	
Homeless Prevention Activities Program Fund	
Special Olympics Colorado Fund	
Western Slope Military Veterans' Cemetery Fund	
Pet Overpopulation Fund	
Colorado Healthy Rivers Fund	
Alzheimer's Association Fund	
Military Family Relief Fund	
Make-A-Wish Foundation of Colorado Fund	
Multiple Sclerosis Fund	
Colorado Breast and Women's Reproductive Cancers Fund	
Adult Stem Cell Cure Fund	
9Health Fair Fund	
Colorado 2-1-1 First Call for Help Fund	
Unwanted Horse Fund	

Enter Any Additional Colorado Information: