

WHAT TO BRING (or mail, fax, email taxhelp@hupptax.com) Tax year **2011**

- W2's**
- 1099's** (1099R, 1099MISC, 1099INT, 1099DIV, 1099B, 1099G, 1099C, etc.)
- 1098's** (mortgage interest, student loans, tuition, etc.)
- Anything marked **"Important Tax Document"**

Name _____
 Contact information (we will confirm at check in):
 Phone # _____
 Which dependents should be on your return?

 Did you move? If so, date? _____
 New address _____

If you're new to Hupp Tax Service, bring: ❖ Prior year tax returns (Federal State & City).
 ❖ Social Security numbers & birthdates for everyone included in your return.

Section 1 - All clients please complete.

Do you have control over a foreign bank account? Yes No

Quarterly estimate payments
 (If married filing separately, please specify which spouse)

None / Not applicable

	Date Paid	Federal	State	City
1 st qtr	_____	_____	_____	_____
2 nd qtr	_____	_____	_____	_____
3 rd qtr	_____	_____	_____	_____
4 th qtr	_____	_____	_____	_____
Total	_____	_____	_____	_____

College tuition - Great credits are available!! We need: 1098T from the school, the year of school as of 1/1/11 (Freshmen, etc.), are you reimbursed by anyone (military, employer, etc) If student is an undergrad you may benefit from book expenses under the American Opportunity Credit.

None / Not applicable

Child Care

Expenses for child care in order for you to work.

Child _____ Amt Paid \$ _____

None / Not applicable

Provider Name _____

Address _____

Tax ID or SS number _____

2011 IRA contributions. Please note the amount, whether taxpayer or spouse, and type of IRA.

None / Not applicable

Traditional \$ _____

Roth \$ _____

Self-Employed or Rental Property

Include name, address and type of each business or rental property.

None / Not applicable

Summarize separately or use our worksheet at hupptax.com:

- Income
- Expenses (phone, licenses, business miles, etc.)
- Please list equipment and capital improvements individually

Home office

An area used regularly and exclusively for business.

None / Not applicable

Summarize on a separate sheet:

- Square feet of office and home, cost of house, dates used.
- Annual household expenses for utilities, insurance, mortgage interest, property taxes, office remodeling or improvements, etc.

Section 2 - ITEMIZED DEDUCTIONS - Complete this section only if you itemize. When in doubt, fill it out. It may help us save you money. The list below is not all-inclusive, but includes examples of items that are commonly deductible. *If you are married and might file separately, please indicate which spouse incurred the expense (especially medical & miscellaneous).*

<input type="checkbox"/> Mortgage Interest and Property Taxes Please fill in unless summarized on your mortgage statement(s) Form 1098. <input type="checkbox"/> None / Not applicable	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;"></th> <th style="width: 20%; text-align: center;"><u>Mortgage Int.</u></th> <th style="width: 20%; text-align: center;"><u>Property Tax</u></th> </tr> </thead> <tbody> <tr> <td>Primary residence</td> <td style="text-align: right;">\$ _____</td> <td style="text-align: right;">\$ _____</td> </tr> <tr> <td>Second residence</td> <td style="text-align: right;">\$ _____</td> <td style="text-align: right;">\$ _____</td> </tr> </tbody> </table> <input type="checkbox"/> Taxes are included in my mortgage payment		<u>Mortgage Int.</u>	<u>Property Tax</u>	Primary residence	\$ _____	\$ _____	Second residence	\$ _____	\$ _____
	<u>Mortgage Int.</u>	<u>Property Tax</u>								
Primary residence	\$ _____	\$ _____								
Second residence	\$ _____	\$ _____								
<input type="checkbox"/> Charitable Deductions <u>Cash</u> <input type="checkbox"/> None / Not applicable Church \$ _____ Red Cross \$ _____ United Way \$ _____ Others \$ _____ NOTE: IRS requires receipts or cancelled checks for ALL donations.	<u>Non-cash</u> (e.g., clothes, furniture, etc.) <input type="checkbox"/> None / Not applicable Please indicate value of donation: Goodwill \$ _____ Salvation Army \$ _____ Others \$ _____ NOTE: If non-cash donations are more than \$500, we need detailed information: list of items and value, dates donated, recipients, how acquired and value, etc.									
<input type="checkbox"/> Medical Deductions You can deduct medical expenses <u>paid</u> in 2011. NOTE: Medical expenses are deductible once they are over 7.5% of your adjusted gross income. That means, if you earn \$30,000 at your job, medical expenses only start being deductible after you've spent approximately \$2,250. NOTE: Health premiums through your employer are generally already pre-tax as part of a cafeteria or Section 125 plan. <input type="checkbox"/> None / Not applicable	Health insurance premiums <i>not paid thru payroll deduction</i> \$ _____ Prescriptions \$ _____ Long-term care insurance \$ _____ Dentists, Doctors \$ _____ Hospitals, Labs \$ _____ Contacts, eyeglasses \$ _____ Other \$ _____ Miles driven for year _____ (office visits, pharmacy, therapy, etc.)									
<input type="checkbox"/> Miscellaneous Deductions Work related expenses that are not reimbursed by your employer. Miscellaneous deductions are deductible if they are more than 2% of your adjusted gross income. <input type="checkbox"/> None / Not applicable NOTE: Gambling losses are deductible to the extent of your gambling winnings. If you won something this year, your gambling losses might help you if you itemize your deductions.	Union Dues \$ _____ Uniforms, safety equipment \$ _____ Licenses, permits \$ _____ Cell phone expenses (for work) \$ _____ Other \$ _____ Non-commuting work miles _____ Safe deposit box \$ _____ Investment advisory fees \$ _____ Tax preparation \$ _____ Other \$ _____									

*** NOTE: We don't need to see your receipts, but you need to keep them for all of your deductions.**