INCOME TAX ORGANIZER

FOR THE TAX YEAR ENDED

DECEMBER 31, 2012

Specially prepared for:

This tax organizer has been prepared to assist in compiling the information we need to prepare your 2012 income tax returns. This information is vital for us to properly report each item relating to your income, deductions, taxes, and credits. **Please provide us with information for each item in the sections labeled "2012 amounts".** The prior year activity is presented in separate columns as a reminder. Be sure to include copies of related documents and use additional pages if you need more space or have activity which is not shown in this organizer. Please call us if you have questions or need assistance.

It will decrease the time to prepare your returns (and our fee) if you answer the questions shown in this organizer and make sure to give us all the realted information. Be sure to include current year amounts for all of the activity you had in the prior year and indicate if any of the prior year activity no longer applies, otherwise, we may spend additional time calling you about it. All of your original documents will be returned to you upon completion of your tax returns. **We do need to get this Organizer back** and will keep it in our files, so please indicate if you want a copy for your records.

Please be sure to return this organizer to us and copies of the following documents, if applicable.

- Sign and return the engagement letter that we sent to you with this tax organizer.
- All form(s) W-2 for each job held during the tax year, plus year-end pay stub(s) if they show deductible items.
- All form(s) 1099 showing interest, dividends, rents, or other income for all bank and brokerage accounts.
- Schedule(s) of realized gains & loss of all stocks, mutual funds, options, etc., showing proceeds and cost basis.
- Schedule(s) K-1 from Estates, Trusts, S Corporations, Partnerships, etc.
- Mortgage interest statement(s), real estate taxes paid, car registration (tax portioin only), etc.
- Closing statement(s) for any new or refinanced mortgage(s) on real estate.
- Statements for tuition and education expenses showing amounts by category of expense and year actually paid.
- Statements for distributions from Health Savings Accounts (HSA) and any amounts (to be) contributed.
- Detailed list of each non-cash donation, with the date, charity's name, the description & value of each item.
- Any other documents relating to activity which may affect this year's tax returns.

Using this tax organizer, and its instructions, helps to insure that we get all the information necessary for us to prepare complete and accurate tax returns. **Please return this Organizer to us**, even if it is not completely filled out. Your cooperation is greatly appreciated.

Please sign and return the enclosed engagement letter and note the tax appointment (if any) referenced on the enclosed cover letter. Please call us if you have any questions, need assistance, or wish to reschedule or cancel your appointment. Please visit our website at **www.Online-CPA.com** for additional information.

Sincerely,

Brad Borncamp, CPA, CVA, CFP
303-530-4650

2012 TAX DEDUCTIONS CHECKLIST

This list is provided to help identify common deductions and other items. Please use it as a guide to gather the information relating to deductions which are reported on various pages of this organizer. It is not all inclusive, but intended as a reminder of some of the more common deductions.

I. Adjustments to Income:
- A) Payments to IRA, SEP, SIMPLE, or Keogh Accounts.
- B) Student loan interest.
- C) Health insurance paid by a "self-employed" person.
- D) Contributions to Health Savings Accounts (not FSA accounts).
- E) Penalty on early withdrawal of savings.
- F) Alimony paid (but not child support).
- G) Moving expenses (job related).
- H) Teacher expenses and qualified higher education tuition and expenses

II. Itemized Deductions:
- A) Medical expenses (total must exceed 7.5% of AGI):
  - 1) Medical, Dental, Medicare, and Long Term Care insurance premiums.
  - 2) Doctors, dentists, nursing, assisted living services, etc.
  - 3) Hospital, ambulance, lab tests, etc.
  - 4) Prescriptions, hearing aids, eyeglasses, etc.
  - 5) Transportation costs, mileage, and accommodations seeking medical care.
  - 6) The net, after tax amounts paid are deductible, not amounts reimbursed by insurance or flex plans
- B) Taxes paid or withheld during the year:
  - 1) State, local, and foreign income taxes, if more than sales taxes.
  - 2) **Real property taxes**, actually **paid in current year**.
  - 3) Personal property taxes, such as **car ownership taxes, not the registration fees**.
- C) Interest paid:
  - 1) Home mortgage interest (on first and second homes).
  - 2) Points paid and PMI on new or refinanced mortgages.
  - 3) Points paid by the seller, if you bought a home.
  - 4) Investment interest expense.
- D) Contributions:
  - 1) Cash paid to charitable organizations.
  - 2) Non-cash items (clothes, furniture, etc), need detail list if more than $500.
  - 3) Mileage and expenses related to volunteer charity work.
- E) Casualty or theft losses:
  - 1) Amount of property damage or cost of stolen items, less insurance coverage.
  - 2) Must exceed 10% of adjusted gross income + $100.
- F) Miscellaneous items (subject to 2% of AGI):
  - 1) Unreimbursed work related expenses and mileage.
  - 2) Professional dues, subscriptions, etc.
  - 3) Tax preparation, estate planning, and investment fees.
  - 4) Safe deposit box, collection expenses, etc.
  - 5) Attorney fees related to compensatory income.
- G) Other miscellaneous deductions:
  - 1) Estate tax on income in respect of a decedent.
  - 2) Gambling losses (to the extent of winnings).

2012	1040	US	Client Information	1

Brad Borncamp, CPA, LLC
1319 W. Baseline Road, Suite 201
Lafayette, CO 80026
Telephone number: (303) 530-4650
Fax number: (303) 530-4971
E-mail address: bbcpa@qwestoffice.net

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2012 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

Filing Status	Filing status (table)	
	1=married filing separate and lived with spouse	
	Year spouse died, if qualifying widow(er) (2010 or 2011)	
Taxpayer	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	
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	
Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	
Foreign Address	Region	
	Postal code	
	Country	

Filing Status

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying widow(er)

2012	1040	US	Client Information (continued)	1 p2

Please add, change or delete information for 2012.

CLIENT INFORMATION

			Daytime Phone
Taxpayer Contact Information	Home phone		1 = Work 2 = Home 3 = Mobile
	Work phone		
	Work extension		
	Daytime phone (table)		
	Mobile phone		
	Pager number		
	Fax number		
	E-mail address		
Spouse Contact Information	Home phone		
	Work phone		
	Work extension		
	Daytime phone (table)		
	Mobile phone		
	Pager number		
	Fax number		
	E-mail address		

2012	1040	US	Dependents	2

Please add, change or delete information for 2012.

DEPENDENTS

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

	Dependent	Dependent
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		
Type of dependent (see table)		
Earned income credit (see table)		
Claimed by: 1=taxpayer, 2=spouse		

Type of Dependent

1 = Child living w/taxpayer
2 = Child not living w/taxpayer
3 = Dependent other than child
4 = Head of household only, not a dependent
5 = Earned income credit only, not a dependent

Earned Income Credit

1 = When applicable (default)
2 = Student age 19 to 23
3 = Disabled
4 = Force
5 = Suppress

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the U.S. This proof is typically in the form of:

1. School records or statement
2. Landlord or property management statement
3. Health care provider statement
4. Medical records
5. Child care provider records
6. Placement agency statement
7. Social service records or statement
8. Place of worship statement
9. Indian tribe office statement
10. Employer statement

NOTE: If your child is disabled, please provide one of the following forms of proof of disability:

1. Doctor statement
2. Other health care provider statement
3. Social services agency or program statement

2012	1040	US	Miscellaneous Questions

Please answer all of the following questions as they pertain to you or your spouse for 2012 by checking the appropriate "yes" or "no" boxes. Provide additional information as requested.
Unanswered questions will generally be interpreted as a "no" response.

Yes	No	
		PERSONAL INFORMATION
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Could you be claimed as a dependent on another person's tax return for 2012?
		DEPENDENTS
☐	☐	Were there any changes in dependents, such as a new infant, adoptions, etc. ?
☐	☐	Were any of your unmarried dependents 19 years of age or older at the end of 2012 If yes, please note on the "Dependents" page whether or not they were a full time student for at least half the school year.?
☐	☐	Did you have any dependents under age 24 on January 1, 2013 with interest and dividend income in excess of $950, or total gross income in excess of $1,900?
		INCOME
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
☐	☐	Did you receive any disability income, if so, is it taxable?
☐	☐	Did you have any income from foreign sources or pay any foreign taxes (outside of a retirement account)?
		PURCHASES, SALES AND DEBT
☐	☐	Did you sell any stocks, bonds, mutual funds, or other investments (outside of a retirement account)? If so, include 1099 statements with details.
☐	☐	Did you sell any stock of dividend paying U. S. corporations during the 60 day period following the ex-dividend date of this stock?
☐	☐	Did you purchase or sell a house or other real estate, get a home equity loan, or refinance any mortgages? If so, include copies of all settlement statements.
☐	☐	Did you pay for any energy improvements to your home (i.e. insulation, windows, furnance, solar panels) or purchase a hybrid or alternative fuel vehicle?
☐	☐	Did you have any debts (i.e. credit cards or mortgages) forgiven or cancelled during 2012?
☐	☐	Did any loans you made to others become uncollectible during 2012?

2012 | 1040 | US | Miscellaneous Questions

Yes	No	
		BUSINESS ACTIVITY
☐	☐	Were you or your spouse self employed at any time during 2012? If so, include a summary of related income and expenses.
☐	☐	Did you, or your spouse, start a business, purchase rental property, or acquire an interest in oil and gas wells, a partnership, S corporation, trust, or an estate during 2012?
☐	☐	Did you purchase or dispose of any business assets (i.e. furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
☐	☐	Was any part of your home used exclusively and regularly for business, if so do you want to deduct home office expenses?
☐	☐	Was any part of your home rented out for more than 14 days during 2012?
☐	☐	Did you incur moving expenses to move more than 50 miles due to a change of employment for you or your spouse?
☐	☐	Did you employ any persons as household employees, excluding contract/agency workers, if so give details?
		RETIREMENT PLANS
☐	☐	Did you receive distributions from any retirement plans (401(k), IRA, SEP, SIMPLE, Pension, etc.) during 2012?
☐	☐	Did you already make, or do you plan to make, contributions to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) for this tax year?
☐	☐	Did you convert any part of your traditional, SEP, or SIMPLE IRA's to a Roth IRA during 2012, if so give details?
		EDUCATION
☐	☐	Did you make any contribution(s) to an Education Savings Account, a 529 Plan, or Qualified Tuition Program? If so, provide documents showing the plan sponsor, beneficiary, date and amount of contribution(s), and what state this plan is related.
☐	☐	Did you receive a distribution from an Education Savings Account, 529 Plan, or a Qualified Tuition Program?
☐	☐	Did you or any of your dependents pay or incur tuition or other expenses to attend college or vocational school?
☐	☐	Did you incur any expenses working as a teacher, counselor, or principal for grades kindergarten through 12?

2012	1040	US	Miscellaneous Questions

Yes	No	
		ITEMIZED DEDUCTIONS
☐	☐	Did you incur a casualty loss because of damaged or stolen property during 2013?
☐	☐	Did you incur any unreimbursed business expenses, including travel away from home, during the year?
☐	☐	Did you spouse use your car on the job (other than to and from work) which was not reimbursed?
		PRESIDENTIAL ELECTION CAMPAIGN
☐	☐	Do you want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	Does your spouse want to allocate $3 to the Presidential Election Campaign Fund?
		MISCELLANEOUS
☐	☐	The IRS requires us to electronically file (e-file) ALL tax returns unless you (the taxpayer) expressly request not to e-file. Check "NO" if you do NOT want to e-file, and we will need to have you sign a waiver form and give you extra copies of federal and state "paper" returns to file.
☐	☐	May the IRS discuss the information in this return with the preparer, only on an "as needed" basis?
☐	☐	Do you expect 2013 income and withholdings to be significantly different from 2012?
☐	☐	Were you notified of any changes to any of your tax returns by either the IRS or any State taxing agency during the past year?
☐	☐	Did you make gifts to an any individuals or trusts of more than $13,000 during 2012?
☐	☐	Did you own an interest in or have signature or other authority over financial assets (such as a bank, brokerage, trust account, or real estate) in a foreign country ? If so give us the details as you we may need to file additional forms with your income tax returns. Please note that **you may also be required to file separate forms to report your holdings** which are not part of these income tax returns.
☐	☐	Did you pay any premiums for long-term care (LTC) insurance. If so, list the amounts of premiums paid on **each separate policy** and the amount of any benefits received during the year on the related pages of this organizer.
☐	☐	Did you receive any accelerated death benefits from a life insurance policy?
☐	☐	Are there any other services you would like our firm to provide, if so, please list them.

____

____

2012	1040	US	Miscellaneous Questions

COLORADO VOLUNTARY CONTRIBUTIONS:

Please indicate the amount(s) of charitable contributions you wish to make to any of the following agencies shown on page 2 of the Colorado tax return. These contributions **will** increase the amount due, or decrease your refund. They are deductible as charitable donations in the following tax year.

1) The Nongame and Endangered Wildlife Cash Fund .... $ ___________

2) The Colorado Domestic Abuse Program Fund .... $ ___________

3) The Homeless Prevention Activities Program Fund .... $ ___________

4) The Western Slope Military Veterans' Cemetery Fund .... $ ___________

5) The Pet Overpopulation Fund .... $ ___________

6) The Colorado Healthy Rivers Fund .... $ ___________

7) The Alzheimer's Association Fund .... $ ___________

8) The Military Family Relief Fund .... $ ___________

9) The Colorado Cancer Fund .... $ ___________

10) The Make-A-Wish Foundation of Colorado Fund .... $ ___________

11) Colorado 2-1-1 First Call for Help Fund .... $ ___________

12) The Unwanted Horse Fund .... $ ___________

13) Goodwill Industries Fund .... $ ___________

14) Families in Action for Mental Health .... $ ___________

15) Colorado Multiple Sclerosis Fund .... $ ___________

2012	1040	US	Direct Deposit & Estimates (Form 1040 ES)	3, 6

Please enter all pertinent 2012 information.

DIRECT DEPOSIT / ELECTRONIC PAYMENT (3)

1=direct deposit of federal tax refund into bank account	18	
1=electronic payment of balance due	34	
1=electronic payment of estimated tax	36	

BANK INFORMATION

	Name of Bank		Percent to Deposit (xx.xx)		Routing Number		Account Number		Type of Account (Table 1)		Type of Invest. (Table 2)
19		24		20		21		22		71	
44		45		47		48		49		72	
50		51		67		68		69		73	

2012 ESTIMATED TAX / 1040-ES (6)

Federal

		Amount Paid		Date Paid	TS		2011 Voucher Amount
Overpayment applied from 2011	1						
1st quarter payment	2		3			13	
2nd quarter payment	4		5			14	
3rd quarter payment	6		7			15	
4th quarter payment	8		9			16	
Additional Estimated Tax Payments	38		39				
	40		41				
	42		43				
	44		45				
Paid with extension	10		11			802	

State

		Amount Paid		Date Paid	TS		2011 Voucher Amount
Overpayment applied from 2011	101						
1st quarter payment	102		103			113	
2nd quarter payment	104		105			114	
3rd quarter payment	106		107			115	
4th quarter payment	108		109			116	
Additional Estimated Tax Payments	138		139				
	140		141				
	142		143				
	144		145				
Paid with extension	110		111			804	

1 Type of Account

1 = Savings
2 = Checking

2 Type of Investment

1 = Checking or savings (default)
2 = Taxpayer's IRA (next year limits)
3 = Spouse's IRA (next year limits)
4 = Health savings account (HSA)
5 = Archer MSA
6 = Coverdell savings account (ESA)
7 = Other
8 = Taxpayer's IRA (current year limits)
9 = Spouse's IRA (current year limits)
10 = Series I treasury bonds

3, 6

2012	1040	US	Direct Deposit & Estimates (Form 1040 ES) (cont.)	7.1

Please enter all pertinent 2012 information.

APPLICATION OF 2012 OVERPAYMENT (7.1)

If you have an overpayment of 2012 taxes, do you want the excess refunded?. ☐ or applied to 2013 estimate?. . . . ☐

Other (please explain): ______

2013 ESTIMATED TAX INFORMATION

Do you expect your 2013 taxable income to be different from 2012? . . . . Yes ☐ No ☐

If "yes" explain any differences in income, deductions, dependents, etc.: ______

Do you expect your 2013 withholding to be different from 2012? . . . . Yes ☐ No ☐

If "yes" explain any differences: ______

2012	1040	US	Wages, Pensions, Gambling Winnings	10, 13.1, 13.2

Please enter all pertinent 2012 amounts & attach all W-2, W-2G and 1099-R forms.
Last year's amounts are provided for your reference.

WAGES, SALARIES, TIPS (10)

No.	Name of Employer (Box c)	1=retirement plan (Box 13)	1=spouse	Wages, Tips, Other Compensation (Box 1)	Tax Withheld Federal (Box 2)	Social Security (Box 4)	Medicare (Box 6)	State (Box 17)	Local (Box 19)	2011 Wages
	800	1	2	3	4	6	8	14	18	

PENSIONS, IRA DISTRIBUTIONS (13.1)

No.	Name of Payer	1=spouse	1=IRA/SEP/SIMPLE	Distribution code #1	Distribution code #2	Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld Federal (Box 4)	State (Box 12)	Value of all IRAs at 12/31/12	2011 Distribution
	800	1	2	810	196	3	4	6	9	34	

GAMBLING WINNINGS (W-2G) (13.2)

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld Federal (Box 2)	State (Box 14)	2011 Winnings
	800	1	3	6	9	

GAMBLING LOSSES & WINNINGS (NON W-2G) (13.2)

		2012 Amount	TS	2011 Amount
Total gambling losses	12			
Winnings not reported on Form W-2G	10			

10, 13.1, 13.2

2012	1040	US	Interest & Dividend Income	11, 12

Please enter all pertinent 2012 amounts & attach all 1099-INT, 1099-OID and 1099-DIV forms. Last year's amounts are provided for your reference.

INTEREST INCOME (11)

No.	Name of Payer (also enter SSN & address for seller-financed mortgage)	1=taxpayer 2=spouse	Interest Income: Banks, S&Ls, C/Us, etc. (Box 1)	Interest Income: Seller-Financed Mtg. (Box 1)	Interest Income: U.S. Bonds, T-Bills (Box 3)	Tax-Exempt Interest: Total Municipal Bonds	Tax-Exempt Interest: In-state Municipal Bonds	Early Withdrawal Penalty (Box 2)	2011 Interest
	800 (801, 813, 802, 803)	1	2	3	4	19	5	18	

DIVIDEND INCOME (12)

No.	Name of Payer	1=tp 2=sp	Dividend Income: Total Ordinary Dividends (Box 1a)	Dividend Income: Qualified Dividends (Box 1b)	Dividend Income: Total Capital Gain Distrib. (Box 2a)	Dividend Income: U.S. Bonds (% or amt.)	Tax-Exempt Interest: Total Municipal Bonds	Tax-Exempt Interest: In-state Muni-bonds (% or amt.)	Foreign Tax Paid (Box 6)	2011 Dividends
	800	1	2	30	3	502	18	503	16	

2012	1040	US	Miscellaneous Income	14.1

Please enter all pertinent 2012 amounts and attach all 1099-MISC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.

MISCELLANEOUS INCOME

	2012 Amount				2011 Amount	
	Taxpayer		Spouse		Taxpayer	Spouse
Social security benefits (SSA-1099, box 5)	2		52			
Medicare premiums paid (SSA-1099)	13		63			
Tier 1 RR retirement benefits (RRB-1099, box 5)	3		53			
1=lump-sum election for SS benefits	12		62			
Alimony received	5		55			
Taxable scholarships and fellowships	8		58			
Jury duty pay	28		78			
Household employee income not on W-2	9		59			
Excess minister's allowance	24		74			
Alaska permanent fund dividends	21		71			
Income from rental of personal property	23		73			
Income subject to S/E tax:						
	10		60			
	10		60			
	10		60			
	10		60			
	10		60			
	10		60			
Other income (1099-MISC, box 3)						
	11		61			
	11		61			
	11		61			
	11		61			
	11		61			
	11		61			

TAX WITHHELD (not entered elsewhere)

Federal income tax withheld	14		64			
State income tax withheld	15		65			
Local income tax withheld	16		66			

2012	1040	US	State & Local Tax Refunds / Unemployment Compensation	14.2

Please add, change or delete 2012 information as appropriate.
Be sure to attach all 1099-G forms.

STATE AND LOCAL TAX REFUNDS / UNEMPLOYMENT COMPENSATION (Form 1099-G)

No.			2012 1099-G Amount	
	Name of payer	800		
	1=spouse	1		[redacted]
	Unemployment compensation:			
	Total received (Box 1)	2		
	2012 Overpayment repaid	3		
	State and local refunds:			
	State and local income tax refund, credit or offsets (Box 2)	4		
	1=city or local income tax refund	9		
	Tax year for box 2 if not 2011 (Box 3)	5		
	Federal income tax withheld (Box 4)	6		
No.	ATAA/RTAA payments (Box 5)	25		
	Taxable grants:			
	Federal taxable amount (Box 6)	12		
	State taxable amount, if different	17		
	Farm amounts:			
	Agriculture payments (Box 7)	13		
	1=agriculture payments are from conservation reserve program	24		
	Market gain (Box 9)	26		
	Number of farm	15		
	1=box 2 is trade or business income (Box 8)	14		
	State income tax withheld (Box 11)	11		

No.				
	Name of payer	800		
	1=spouse	1		[redacted]
	Unemployment compensation:			
	Total received (Box 1)	2		
	2012 Overpayment repaid	3		
	State and local refunds:			
	State and local income tax refund, credit or offsets (Box 2)	4		
	1=city or local income tax refund	9		
	Tax year for box 2 if not 2011 (Box 3)	5		
	Federal income tax withheld (Box 4)	6		
No.	ATAA/RTAA payments (Box 5)	25		
	Taxable grants:			
	Federal taxable amount (Box 6)	12		
	State taxable amount, if different	17		
	Farm amounts:			
	Agriculture payments (Box 7)	13		
	1=agriculture payments are from conservation reserve program	24		
	Market gain (Box 9)	26		
	Number of farm	15		
	1=box 2 is trade or business income (Box 8)	14		
	State income tax withheld (Box 11)	11		

2012	1040	US	Education Distributions (ESA's and QTP's)	14.3

Please enter all pertinent 2012 amounts and attach all 1099-Q forms.
Enter qualified education expenses below that are not entered elsewhere.
Last year's amounts are provided for your reference.

ESA'S AND QTP'S (Form 1099-Q)

No.		Code	2012 Amount	2011 Amount
No. ____	Name of payer	800		
	1=spouse	1		
	Qualified expenses:			
	Higher education (net of nontaxable benefits)	143		
	Elementary & secondary education (net of nontaxable benefits)	307		
	Form 1099-Q:			
	Gross distributions (Box 1)	301		
	Earnings (Box 2)	302		
	Basis (Box 3)	303		
	Rollover: 1=nontaxable, 2=taxable (Box 4)	304		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5)	2		
	ESA's only:			
	2012 contributions to this ESA	142		
	Value of this account at 12/31/12 (plus outstanding rollovers)	144		
	Basis in this ESA as of 12/31/11	165		

No.		Code	2012 Amount	2011 Amount
No. ____	Name of payer	800		
	1=spouse	1		
	Qualified expenses:			
	Higher education (net of nontaxable benefits)	143		
	Elementary & secondary education (net of nontaxable benefits)	307		
	Form 1099-Q:			
	Gross distributions (Box 1)	301		
	Earnings (Box 2)	302		
	Basis (Box 3)	303		
	Rollover: 1=nontaxable, 2=taxable (Box 4)	304		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5)	2		
	ESA's only:			
	2012 contributions to this ESA	142		
	Value of this account at 12/31/12 (plus outstanding rollovers)	144		
	Basis in this ESA as of 12/31/11	165		

No.		Code	2012 Amount	2011 Amount
No. ____	Name of payer	800		
	1=spouse	1		
	Qualified expenses:			
	Higher education (net of nontaxable benefits)	143		
	Elementary & secondary education (net of nontaxable benefits)	307		
	Form 1099-Q:			
	Gross distributions (Box 1)	301		
	Earnings (Box 2)	302		
	Basis (Box 3)	303		
	Rollover: 1=nontaxable, 2=taxable (Box 4)	304		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5)	2		
	ESA's only:			
	2012 contributions to this ESA	142		
	Value of this account at 12/31/12 (plus outstanding rollovers)	144		
	Basis in this ESA as of 12/31/11	165		

2012	1040	US	Business Income (Schedule C)	No.	16

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Principal business/profession	800	
Principal business code	801	
Business name, if different from Form 1040	802	
Business address, if different from Form 1040	803	
City, if different from Form 1040	804	
State, if different from Form 1040	828	
ZIP code, if different from Form 1040	829	
Employer identification number	805	
Other accounting method	806	

Accounting method: 1=cash, 2=accrual	7		
Inventory method: 1=cost, 2=lower cost/market, 3=other	6		
1=change of inventory method	8		
1=spouse, 2=joint	10		
1=first Schedule C filed for this business	44		
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no	112		
1=not subject to self-employment tax	39		
1=did not "materially participate"	22		
1=personal services is not a material income producing factor	220		
1=investment	37		
1=minister's Schedule C	302		
1=single member limited liability company	418		

INCOME

		2012 Amount	2011 Amount
Gross receipts or sales (Form 1099-MISC, box 7)	51		
Returns and allowances	52		
Other income:			
	54		
	54		
	54		
	54		
	54		
	54		
	54		
	54		

COST OF GOODS SOLD

Inventory at beginning of the year	14		
Purchases	15		
Cost of items for personal use	16		
Cost of labor	17		
Materials and supplies	18		
Other costs:			
	19		
	19		
	19		
	19		
	19		
Inventory at end of the year	20		

2012	1040	US	Business Income (Schedule C) (cont.)	No.	16 p2

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

EXPENSES

		2012 Amount	2011 Amount
Accounting	201		
Advertising	56		
Answering service	202		
Bad debts from sales or service	57		
Bank charges	203		
Car and truck expenses (not entered elsewhere)	59		
Commissions	60		
Contract labor	87		
Delivery and freight	204		
Dues and subscriptions	205		
Employee benefit programs	64		
Insurance (other than health)	66		
Mortgage interest (paid to banks, etc.)	12		
Other interest (not entered elsewhere)	67		
Janitorial	206		
Laundry and cleaning	207		
Legal and professional	69		
Miscellaneous	208		
Office expense	70		
Outside services	209		
Parking and tolls	210		
Pension and profit sharing plans - contributions	71		
Pension and profit sharing plans - admin. and education costs	53		
Postage	211		
Printing	212		
Rent - vehicles, machinery, & equipment (not entered elsewhere)	58		
Rent - other	72		
Repairs	73		
Security	213		
Supplies	74		
Taxes - real estate	45		
Taxes - payroll	41		
Taxes - sales tax included in gross receipts	43		
Taxes - other (not entered elsewhere)	75		
Telephone	214		
Tools	215		
Travel	76		
Total meals and entertainment in full (50%)	81		
Department of Transportation meals in full (80%)	86		
Uniforms	216		
Utilities	77		
Wages	78		

Other expenses:

	90		
	90		
	90		
	90		
	90		
	90		

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

2012	1040	US	Capital Gains & Losses (Schedule D)	17

If you sold any stocks, bonds, or other investment property in 2012, please list the pertinent information for each sale below or provide a spreadsheet file with this information. Be sure to attach all 1099-B forms and brokerage statements.

No.	Quantity	Description of Property (Box 8)	Date Acquired (Box 1b)	Date Sold (Box 1a)	Sales Price (gross or net) (Box 2)	Cost or Basis (Box 3)	Blank=basis rep. to IRS, 1=nonrec. security (Box 6)	Expenses of Sale (if gross sales price entered)	Federal Income Tax Withheld (Box 4)
	847	800	25	26	27	29	541	28	168

2012	1040	US	Rental & Royalty Income (Schedule E)	No.	18

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

RENTAL & ROYALTY INCOME (Schedule E)

		2012 Amount	2011 Amount
Description of property	800		
Street address	801		
City	820		
State	821		
ZIP code	822		
Type of property (see table)	802		
Other type of property	803		
Number of days rented	34		

GENERAL INFORMATION

Percentage of ownership if not 100% (.xxxx)	500		
Percentage of tenant occupancy if not 100% (.xxxx)	503		
1=spouse, 2=joint	33		
1=qualified joint venture	108		
If required to file Form(s) 1099, did you or will you file all required Form(s) 1099: 1=yes, 2=no	112		
1=nonpassive activity, 2=passive royalty	39		
1=did not actively participate	38		
1=real estate professional	32		
1=rental other than real estate	71		
1=investment	48		
1=single member limited liability company	418		

Type of Property

1 = Single Family Residence
2 = Multi-Family Residence
3 = Vacation/Short-Term Rental
4 = Commercial
5 = Land
6 = Royalties
7 = Self-Rental

INCOME

		2012 Amount	2011 Amount
Rents or royalties received	110		

DIRECT EXPENSES

NOTE: Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

		2012 Amount	2011 Amount
Advertising	4		
Association dues	16		
Auto and travel (not entered elsewhere)	5		
Cleaning and maintenance	6		
Commissions	7		
Gardening	18		
Insurance	8		
Legal and professional fees	10		
Licenses and permits	23		
Management fees	19		
Miscellaneous	24		
Mortgage interest (paid to banks, etc.)	9		
Qualified mortgage insurance premiums	62		
Excess mortgage interest	67		
Other interest (not entered elsewhere)	29		
Painting and decorating	20		

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

2012	1040	US	Rental & Royalty Income (Sch. E) (cont.)	No.	18 p2

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.

DIRECT EXPENSES (continued)

Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

		2012 Amount	2011 Amount
Pest control	21		
Plumbing and electrical	17		
Repairs	11		
Supplies	12		
Taxes - real estate	13		
Taxes - other (not entered elsewhere)	25		
Telephone	22		
Utilities	14		
Wages and salaries	15		
Other:			
	27		
	27		
	27		
	27		

OIL AND GAS

Production type (preparer use only)	42		
Cost depletion	43		
Percentage depletion rate or amount	502		
State cost depletion, if different (-1 if none)	76		
State % depletion rate or amount, if different (-1 if none)	506		

VACATION HOME

Number of days personal use	35		
Number of days owned (if optional method elected)	53		

INDIRECT EXPENSES

NOTE: Indirect expenses are related to operating or maintaining the dwelling unit. These include repairs, insurance, and utilities.

Advertising	204		
Association dues	216		
Auto and travel (not entered elsewhere)	205		
Cleaning and maintenance	206		
Commissions	207		
Gardening	218		
Insurance	208		
Legal and professional fees	210		
Licenses and permits	223		
Management fees	219		
Miscellaneous	224		
Mortgage interest (paid to banks, etc.)	209		
Qualified mortgage insurance premiums	262		
Excess mortgage interest	267		
Other interest (not entered elsewhere)	229		
Painting and decorating	220		

2012	1040	US	Rental & Royalty Income (Sch. E) (cont.)	No.	18 p3

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.

INDIRECT EXPENSES (continued)

NOTE: Indirect expenses are related to operating or maintaining the dwelling unit. These include repairs, insurance, and utilities.

		2012 Amount	2011 Amount
Pest control	221		
Plumbing and electrical	217		
Repairs	211		
Supplies	212		
Taxes - real estate	213		
Taxes - other (not entered elsewhere)	225		
Telephone	222		
Utilities	214		
Wages and salaries	215		
Other:			
	227		
	227		
	227		
	227		
	227		
	227		
	227		
	227		
	227		

2012	1040	US	Partnership and S corporation Information	20.1,20.2

Please add, change or delete 2012 information as appropriate. Be sure to attach all Schedule K-1s.

PARTNERSHIP INFORMATION (20.1)

No.	Name of Partnership	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in Partnership
	800	801	802	161

S CORPORATION INFORMATION (20.2)

No.	Name of S corporation	Employer Identification Number	Tax Shelter Registration Number	Additional Amounts Invested in S corporation
	800	801	802	161

2012	1040	US	Estate or Trust and REMIC Information	20.3,20.4

Please add, change or delete 2012 information as appropriate.
Be sure to attach all Schedule K-1s and Schedule Qs.

ESTATE OR TRUST INFORMATION (20.3)

No.	Name of Estate or Trust	Employer Identification Number	Tax Shelter Registration Number
	800	801	802

REMIC INFORMATION (20.4)

No.	Name of REMIC	Employer Identification Number
	800	801

2012	1040	US	Vehicle Expenses	No.	22 p3

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

		2012 Amount	2011 Amount
Description of vehicle	800		
1=no evidence to support your deduction	30		
1=no written evidence to support your deduction	31		
1=vehicle is available for off-duty personal use	39		
1=no other vehicle is available for personal use	40		
1=vehicle used primarily by more than 5% owner	41		
Number of months your job required a vehicle (if not 12 months)	333		

AUTOMOBILE MILEAGE

		2012 Amount	2011 Amount
Total mileage (for the tax year)	36		
Business mileage	37		
Commuting mileage (for the tax year)	38		
Average daily round-trip commute	334		

ACTUAL EXPENSES

		2012 Amount	2011 Amount
Parking fees and tolls (business portion only)	335		
Gasoline, lube, oil	338		
Repairs	339		
Tires	340		
Insurance	341		
Miscellaneous	342		
Auto license (other than personal property taxes)	343		
Personal property taxes (based on car's value)	344		
Interest (car loan) (for Schedule C, E & F)	345		
Vehicle rent or lease payments	350		
Inclusion amount (enter as positive)	351		
Value of employer-provided vehicle on Form W-2 (2106)	346		

2012	1040	US	Adjustments to Income	24

Please enter all pertinent 2012 information. Last year's amounts are provided for your reference.

TRADITIONAL IRA CONTRIBUTIONS

		2012 Amount Taxpayer		2012 Amount Spouse	2011 Amount Taxpayer	2011 Amount Spouse
IRA contributions you made or expect to make (1=maximum) ($5,000/$6,000 if 50 or older)	1		51			
Contributions made to date	3		53			
1=covered by plan, 2=not covered	5		55			
2012 payments from 1/1/13 to 4/15/13	8		58			

ROTH IRA CONTRIBUTIONS

		2012 Amount Taxpayer		2012 Amount Spouse	2011 Amount Taxpayer	2011 Amount Spouse
Roth IRA contributions you made or expect to make (1=maximum) ($5,000/$6,000 if 50 or older)	27		77			
Contributions made to date	30		80			

SEP, SIMPLE AND QUALIFIED PLANS (KEOGH)

		2012 Amount Taxpayer		2012 Amount Spouse	2011 Amount Taxpayer	2011 Amount Spouse
Profit-sharing (25%/1.25) contributions you made or expect to make (1=maximum)	10		60			
Money purchase (25%/1.25) contributions you made or expect to make (1=maximum)	11		61			
Defined benefit contributions you expect to make	13		63			
Self-employed SEP (25%/1.25) contributions you made or expect to make (1=maximum)	12		62			
Plan contribution rate if not .25 (.xxxx)	501		551			
Individual 401k: SE elective deferrals (except Roth) (1=max.)	44		94			
Individual 401k: SE designated Roth contributions (1=max.)	144		194			

SIMPLE contributions:

		2012 Amount Taxpayer		2012 Amount Spouse	2011 Amount Taxpayer	2011 Amount Spouse
Self-employed SIMPLE contributions you made or expect to make (1=maximum)	22		72			
Employer matching rate if not .03 (.xxxx)	502		552			
1=nonelective contributions (2%)	24		74			
Contributions made to date	14		64			

ADJUSTMENTS TO INCOME

Self-employed health insurance:

		2012 Amount Taxpayer		2012 Amount Spouse	2011 Amount Taxpayer	2011 Amount Spouse
Total premiums (excluding long-term care)	16		66			
Long-term care premiums	26		76			
Student loan interest paid (1098-E, box 1)	23		73			
Educator expenses (kindergarten thru grade 12)	28		78			
Jury duty pay given to employer	43		93			
Expenses from rental of personal property	37		87			

Other adjustments to income:

		2012 Amount Taxpayer		2012 Amount Spouse	2011 Amount Taxpayer	2011 Amount Spouse
	19		69			
	19		69			
	19		69			

Alimony paid:

	Taxpayer		Spouse	
Recipient's first name	39.___		89.___	
Recipient's last name	40.___		90.___	
Recipient's SSN	41.___		91.___	
Amount paid	18.___	2011 amt:	68.___	2011 amt:

2012	1040	US	Itemized Deductions	25

Please enter all pertinent 2012 amounts and attach all 1098 forms.
Last year's amounts are provided for your reference.

MEDICAL AND DENTAL EXPENSES

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

		2012 Amount	TS	2011 Amount
Prescription medicines and drugs	4			
Doctors, dentists and nurses	5			
Hospitals and nursing homes	6			
Insurance premiums not entered elsewhere (excl. LT care & amts. paid w/pre-tax dollars)	7			
Long-term care premiums - taxpayer	17			
Long-term care premiums - spouse	58			
Insurance reimbursement (enter as a positive number)	8			
Lodging and transportation:				
Out-of-pocket expenses	9			
Medical miles driven	52			
Other medical and dental expenses:				
	10			
	10			
	10			

TAXES PAID (State and local withholding and 2012 estimates are automatic.)

State income taxes - 1/12 payment on 2011 state estimate	11			
State income taxes - paid with 2011 state return extension	12			
State income taxes - paid with 2011 state return	13			
State income taxes - paid for prior years and/or to other state	14			
City/local income taxes - 1/12 payment on 2011 city/local estimate	211			
City/local income taxes - paid with 2011 city/local extension	212			
City/local income taxes - paid with 2011 city/local return	213			

SALES AND USE TAXES PAID

State and local sales taxes (except autos and special items)	91			
Use taxes paid on 2012 purchases	92			
Use taxes paid with 2011 state return	96			
Sales tax on autos not included above	349			
Sales tax on boats, aircraft, other special items	93			

OTHER TAXES PAID

Real estate taxes - principal residence:				
	15			
	15			
	15			
Real estate taxes - property held for investment	16			
Personal property taxes (including auto fees in some states. Provide a copy of tax notice)	18			
Foreign income taxes	19			
Other taxes:				
	20			
	20			
	20			

2012	1040	US	Itemized Deductions (continued)	25 p2

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

INTEREST PAID

		2012 Amount	TS	2011 Amount
Home mortgage int. (Box 1) and points (Box 2) reported on Form 1098:				
	21			
	21			
	21			

Home mortgage interest not reported on Form 1098:

Payee's name	85.___	
Payee's SSN or FEIN	86.___	
Payee's street address	87.___	
Payee's city	88.___	
Payee's state	106.___	
Payee's ZIP code	108.___	

		2012 Amount	TS	2011 Amount
Amount paid	22.___			
Points not reported on Form 1098:				
	23			
	23			
Mortgage insurance premiums on post 12/31/06 contracts (Box 4)	39			
Investment interest (interest on margin accounts):				
	24			
	24			
Passive interest	27			
Certain home mortgage interest included above (6251)	30			

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Churches, schools, hospitals, and other charitable organizations (50% limitation):

Contributions by cash or check:

		2012 Amount	TS	2011 Amount
	32			
	32			
	32			
	32			
	32			
Volunteer expenses (out-of-pocket)	31			
Number of charitable miles	53			

Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:

		2012 Amount	TS	2011 Amount
	41			
	41			
	41			
	41			
	41			
Volunteer expenses (out-of-pocket)	40			
Number of charitable miles	54			

(T=taxpayer, S=spouse, Blank=joint)

2012	1040	US	Itemized Deductions (continued)	25 p3

Please enter all pertinent 2012 amounts. Last year's amounts are provided for your reference.

NONCASH CONTRIBUTIONS

NOTE: Use Sheet 26 if total noncash contributions are over $500. No deduction is allowed for contributions of clothing and household items that are not in *good* used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

		2012 Amount	TS	2011 Amount
50% limitation (see above):				
	33			
	33			
	33			
	33			
30% limitation (see above):				
	34			
	34			
	34			
	34			
30% capital gain property (gifts of capital gain property to 50% limit orgs.):				
	35			
	35			
	35			
	35			
20% capital gain property (gifts of capital gain property to non-50% limit orgs.):				
	36			
	36			
	36			
	36			

MISCELLANEOUS DEDUCTIONS (subject to 2% AGI limit)

		2012 Amount	TS	2011 Amount
Union and professional dues	42			
Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):				
	43			
	43			
	43			
	43			
	43			
	43			
Investment expense:				
	44			
	44			
	44			
	44			
	44			
	44			
Tax return preparation fee	45			
Safe deposit box rental	46			
Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):				
	47			
	47			
	47			
	47			
	47			
	47			

2012	1040	US	Noncash Contributions (Form 8283)	26

If your total noncash contributions are in excess of $500 in 2012, please complete the information below for each donee using the following guidelines:

* If you contributed a motor vehicle, boat, or airplane with a claimed value of more than $500, attach Form 1098-C or other written acknowledgement received from the donee organization.
* A deduction for contributions of clothing or other household items that are not in *good* used condition or better is not allowed. In addition, a deduction for any item with minimal monetary value may be denied. However, these rules do not apply to any contribution of a single item for which a deduction of more than $500 is claimed, if a qualified appraisal for the donated property is provided.

DONATED PROPERTY INFORMATION

No.		Name of charitable organization (donee)	800	
		Street address	801	
		City	802	
		State	831	
		ZIP code	832	
		1=spouse, 2=joint	1	
		Property description (other than vehicle)	803	
	Vehicle	Identification number (VIN)	204	
		Year (yyyy)	14	
		Make and model	829	
		Condition and mileage	830	
		Date of contribution (m/d/y)	5	
		Date acquired by donor (m/y)	6	
		How acquired by donor (Table 1 or describe)	804	
		Donor's cost or basis	7	
		Fair market value	8	
		Method used to determine FMV (Table 2 or describe)	805	

No.		Name of charitable organization (donee)	800	
		Street address	801	
		City	802	
		State	831	
		ZIP code	832	
		1=spouse, 2=joint	1	
		Property description (other than vehicle)	803	
	Vehicle	Identification number (VIN)	204	
		Year (yyyy)	14	
		Make and model	829	
		Condition and mileage	830	
		Date of contribution (m/d/y)	5	
		Date acquired by donor (m/y)	6	
		How acquired by donor (Table 1 or describe)	804	
		Donor's cost or basis	7	
		Fair market value	8	
		Method used to determine FMV (Table 2 or describe)	805	

1 How Property was Acquired

1 = Purchase
2 = Gift
3 = Inheritance
4 = Exchange

2 Method Used to Determine FMV

1 = Appraisal
2 = Thrift shop value
3 = Catalog
4 = Comparable sales

For other methods, see IRS Pub. 561.

2012	1040	US	Child and Dependent Care Expenses (Form 2441)	33.1,33.2

Please enter all pertinent 2012 information. Last year's amounts are provided for your reference. You must have paid for the care of one or more dependents enabling you to work or attend school to qualify for this credit.

DEPENDENT CARE EXPENSES (33.1)

	2012 Amount Taxpayer		2012 Amount Spouse		2011 Amount Taxpayer	2011 Amount Spouse
Dependent care expenses incurred but not paid in 2012	3		53			
Employer-provided benefits forfeited in 2012	6		56			

PERSONS AND EXPENSES QUALIFYING FOR DEPENDENT CARE CREDIT

No.				
	First name	17		
	Last name	18		
	Date of birth (m/d/y)	22		
	Social security number	19		
	Qualified dependent care expenses incurred and paid in 2012	20		2011 amt:
	1=disabled	23		
	1=spouse, 2=joint	21		

No.				
	First name	17		
	Last name	18		
	Date of birth (m/d/y)	22		
	Social security number	19		
	Qualified dependent care expenses incurred and paid in 2012	20		2011 amt:
	1=disabled	23		
	1=spouse, 2=joint	21		

No.				
	First name	17		
	Last name	18		
	Date of birth (m/d/y)	22		
	Social security number	19		
	Qualified dependent care expenses incurred and paid in 2012	20		2011 amt:
	1=disabled	23		
	1=spouse, 2=joint	21		

PERSONS OR ORGANIZATIONS PROVIDING CARE (33.2)

No.				
	Name of provider	10		
	Street address	11		
	City, state, ZIP code	12		
	Identification number (SSN or EIN)	13		
	Amount paid to care provider in 2012	14		2011 amt:
	1=spouse, 2=joint	15		

No.				
	Name of provider	10		
	Street address	11		
	City, state, ZIP code	12		
	Identification number (SSN or EIN)	13		
	Amount paid to care provider in 2012	14		2011 amt:
	1=spouse, 2=joint	15		

2012	1040	US	Education Credits / Tuition Deduction	No.	38

Please complete the information below if you paid qualified education expenses in 2012 for you, your spouse, or your dependents enrolled in an accredited postsecondary institution. Last year's amounts are provided for your reference.

STUDENT INFORMATION

1=taxpayer, 2=spouse	17		
First name	12		
Last name	13		
Social security number	14		
Number of years hope credit claimed	23		
Number of years American opportunity credit claimed	35		
1=student was NOT entrolled at least half-time for at least one academic period that began in 2012 at an eligible institution in a qualified program	41		
1=student completed first four years of post-secondary education before 2012	32		
1=student was convicted, before the end of 2012, of a felony for possession or distribution of a controlled substance	42		

EDUCATIONAL INSTITUTION ATTENDED (#1)

Name	850.___		
Street address	851.___		
City	852.___		
State	853.___		
ZIP code	854.___		
1=2012 Form 1098-T received	43.___		
1=2012 Form 1098-T received with Box 2 & 7 completed	44.___		
Federal ID number from Form 1089-T	858.___		

EDUCATIONAL INSTITUTION ATTENDED (#2)

Name	850.___		
Street address	851.___		
City	852.___		
State	853.___		
ZIP code	854.___		
1=2012 Form 1098-T received	43.___		
1=2012 Form 1098-T received with Box 2 & 7 completed	44.___		
Federal ID number from Form 1089-T	858.___		

QUALIFIED EDUCATION EXPENSES

		2012 Amount	2011 Amount
Qualified tuition & fees paid in 2012 (net of refund or assistance, & not entered elsewhere)	16		
Books & supplies required to be purchased from institution	27		
Books & supplies not entered above	28		
Amount of prior year refund or assistance *	20		

* Refund of qualified expenses and tax-free educational assistance received after you file your return for the year in which the expenses were paid.

2012	1040	US	Additional Information

Please furnish any additional information or supporting details not provided elsewhere in this tax organizer.