

Gerald Hersh EA

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Appointment scheduled for: _____

ORGANIZER & CHECKLIST FOR 2011 TAXES

Name	Social Security #	Date of Birth	Date of Death	Legally Blind	\$3 to Pres. Elections	Occupation

Email Address	Phone Number	Fax Number	Married or Divorced	College Tuition Bring Bills	College Books & Materials

Filing Status: Single Married filing joint Qualified Widow Married Filing Separately Head of Household

DEPENDENTS: Full Name from the social security card	Social Security #	Date of Birth	Relation ship	Income Yes / No	College Tuition Bring Bills	College Books & Materials

Please bring in & record the number of forms received for yourself and all dependents

W-2	1098	1098-E	1098-T
1099-INT/DIV/B	1099-LTC	1099-MISC	1099-Q
1099-R	1099-SSA	K-1	Other Forms:

Other Income and Expenses: Please indicate amounts or bring details.

Alimony Received	Alimony Paid	Mass Rent Paid
Other Income	Adoption Expenses	Moving Expenses
Other Income	Student Loan Interest	Purchase/Sale of Home
Retirement & HSA Contributions	IRS and State Notices	Energy Efficient Home Improvements

Bring all the documents regarding any income or property purchases and sales

CHILD & DEPENDENT CARE EXPENSES (Please separate per child. Use additional pages if needed)

Dependent's Name	Daycare Name	Address	Daycare FID or Social Security #	Amount paid