

Franklin P Sparkman, JR., CPA, PA
TAX INFORMATION ORGANIZER
(Please Print)

NAME _____
ADDRESS _____
EMAIL: _____
TELEPHONE: (W) _____ (H) _____
TAXPAYER: SSN _____ BIRTHDATE _____
SPOUSE: SSN _____ BIRTHDATE _____

DEPENDENTS:

<u>FULL NAME</u>	<u>SOCIAL SECURITY NO.</u>	<u>BIRTHDATE</u>	<u>RELATIONSHIP</u>

PLEASE BRING ALL W-2 FORMS AND ANY 1099 FORMS WITH YOU!!!!
IF YOU HAVE INCOME FROM PARTNERSHIPS AND/OR S-CORPATIONS, ATACH K-1'S, REAL ESTATE, ETC.:

STATE TAX REFUND _____
UNEMPLOYMENT INCOME: TAXPAYER _____ SPOUSE _____
SOCIAL SECURITY INCOME: TAXPAYER _____ SPOUSE _____
MISCELLANEOUS INCOME: **Did you or should you have received the Child Tax Credit Advance?** _____
TAXPAYER _____ SPOUSE _____

INTEREST INCOME:

<u>TAXPAYER, SPOUSE, JOINT</u>	<u>AMOUNT</u>	<u>PAYER</u>

DIVIDEND INCOME:

<u>T/S/J</u>	<u>PAYER</u>	<u>AMOUNTS</u>			<u>TAX WTHD</u>
		<u>ORDINARY</u>	<u>CAPITAL GAINS</u>	<u>L/T GAINS</u>	

STOCK SALES:

<u>DESCRIPTION</u>	<u>DATE ACQUIRED</u>	<u>DATE SOLD</u>	<u>SALE PRICE</u>	<u>COST OR BASIS</u>

RECEIPT OF PENSIONS, PROFIT SHARING, IRA DISTRIBUTIONS, OR WITHDRAWALS: Please bring your 1099R's

ADJUSTMENTS TO INCOME:
CONTRIBUTION TO IRA: TAXPAYER _____ SPOUSE _____
CONTRIBUTION TO ROTH IRA: TAXPAYER _____ SPOUSE _____
CONTRIBUTION TO SEP: TAXPAYER _____ SPOUSE _____
PENALTY OF EARLY WITHDRAWAL OF SAVING TAXPAYER _____ SPOUSE _____
TEACHER EXPENSES (\$250 MAX) TAXPAYER _____ SPOUSE _____
TUITION PAID IN 2010 _____ (mark one) freshman _____ sophomore _____ junior _____ senior _____
Semester Hours Spring _____ summer _____ fall _____
Who is tuition paid for: _____

MEDICAL DEDUCTIONS:

PRESCRIPTION MEDICINE AND DRUGS _____

MEDICAL INSURANCE PREMIUMS _____

DOCTOR, DENTIST, HOSPITAL _____

OTHER: _____

MEDICAL MILEAGE: _____ MILES

TAXES

REAL ESTATE _____

PERSONAL PROPERTY TAXES _____

QUARTERLY ESTIMATED TAXES PAID FOR TAX YEAR 2010: FEDERAL _____ STATE _____

ADDITIONAL STATE INCOME TAXES PAID IN 2010 _____

IF YOU PAID YOUR LAST STATE ESTIMATED PAYMENT IN 2011 FOR 2010 LIST IT HERE _____

INTEREST EXPENSE:

HOME MORTGAGE(S) TO _____ INTEREST PAID _____

DEDUCTIBLE POINTS _____

2nd MORTGAGE PD TO _____ INTEREST PAID _____

INVESTMENT INTEREST _____

***NOTE: IF YOU REFINANCED OR SOLD YOUR HOME THIS PAST YEAR, PLEASE BRING YOUR CLOSING STATEMENT INFORMATION WITH YOU.**

CONTRIBUTIONS:

CHURCH NAME/ORGANIZATION NAME

CASH OR OTHER?

AMOUNT

CHARITY MILEAGE _____ MILES

***NOTE TO ALL AIRLINE EMPLOYEE'S SEE NOTE BELOW:**

PLEASE PUT MISCELLANEOUS WORK EXPENSES ON THE ADDITIONAL WORKSHEET PROVIDED

OTHER MISCELLANEOUS DEDUCTIONS:

UNION DUES _____

SMALL TOOLS _____

TAX RETURN FEE _____

JOB EDUC./SEMINAR EXP. _____

PROF. DUES _____

UNIFORMS/MAINT. _____

SAFETY EQUIP. _____

SAFETY DEP BOX _____

BUSINESS MILEAGE _____ MILES

OTHER _____

CHILD CARE EXPENSES:

NAME & ADDRESS OF PERSON PAID

SSN/FIN

AMOUNT PAID

Out of state purchases (i.e. Catalog, Internet, and etc.) _____

AIRLINE EMPLOYEE MISCELLANEOUS EXPENSE

Taxpayer/Spouse

Amount

Annual Physical (Pilots)	_____
Beeper Service	_____
Bid Service Fees & Trip Trading Services	_____
Car Leasing and Rental	_____
Educational Expenses	_____
Flashlights	_____
Foreign Speakers – Language Courses	_____
Hotel/Motel Expenses (Before and/or After a Trip)	_____
Locks, Logbook, and Luggage – Flight Bags, Wheels, Etc...	_____
Overnight Accessories (I will help you with this item)	_____
Passport and Photograph (not reimbursed)	_____
Professional Publications	_____
Safety Equipment	_____
Seminars (Flight Training Expenses)	_____
Sunglasses (Pilots)	_____
Tax Return Preparation Fees	_____
Taxi, Limo Fares and Van Tips (I can help you with this)	_____
Business Related Telephone Calls	_____
Tolls and Parking	_____
Travel for Training Courses	_____
Travel Pass (Employee's Portion Only)	_____
Uniforms – Cleaning, Repair and Purchases	_____
Union Dues	_____
Other Work Related Expenses: (List Here)	_____
_____	_____
_____	_____
_____	_____