2012 Organizer
prepared for:

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2012 Tax Organizer

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2012 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2012 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2011 information is included for your reference. You do not need to make any 2011 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- ☐ A copy of your 2011 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC or Form 1099-R.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

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Table of Contents

Topic Index

General Questions

PERSONAL INFORMATION

		Yes	No
1	Did your marital status change during 2012?	☐	☐
	If **yes,** explain . . . ________		
2	Do you want to allow your tax preparer to discuss this year's return with the IRS?	X	☐
	If **no,** enter another person (if desired) to be allowed to discuss this return with the IRS. **Caution:** Review any transferred information for accuracy. Designee's Name . . ► ________ Phone Number . . . . ► ________ Personal Identification Number (5 digit PIN) . . . ► ________		
3	Do you or your spouse plan to retire in 2013?	☐	☐
4	Were you or your spouse permanently and totally disabled in 2012?	☐	☐
5	Enter date of death for taxpayer or spouse (if during 2012 or 2013): Taxpayer: ________ Spouse: ________		
6	Were you or your spouse a member of the U.S. Armed Forces during 2012?	☐	☐

DEPENDENT INFORMATION

		Yes	No
7 a	Do you have dependents who must file?	☐	☐
b	If **yes,** do you want us to prepare the return(s)?	☐	☐
8 a	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $1,900?	☐	☐
b	If **yes,** do you want to include your child's income on your return?	☐	☐
9	Are any of your dependents **not** U.S. citizens or residents?	☐	☐
10	Did you provide over half the support for any other person during 2012?	☐	☐
11	Did you incur adoption expenses during 2012?	☐	☐

IRA, PENSION AND EDUCATION SAVINGS PLANS

		Yes	No
12	Did you receive payments from a pension or profit-sharing plan?	☐	☐
13	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
14 a	Did you convert all or part of a regular IRA into a Roth IRA?	☐	☐
b	Did you roll over all or part of a qualified plan into a Roth IRA?	☐	☐
15	Did you contribute to a Coverdell Education Savings Account?	☐	☐

ITEMS RELATED TO INCOME/LOSSES

		Yes	No
16	Did you receive any disability payments in 2012?	☐	☐
17	Did you receive tip income **not** reported to your employer?	☐	☐
18 a	Did you buy, sell, refinance, or abandon a principal residence or other real property in 2012? (Attach copies of any escrow statements or Forms 1099.)	☐	☐
b	If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home?	☐	☐
c	Are you planning to purchase a home soon?	☐	☐
19	Did you incur any casualty or theft losses during 2012?	☐	☐
20	Did you incur any non-business bad debts?	☐	☐

PRIOR YEAR TAX RETURNS

		Yes	No
21	Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? If **yes,** enclose agent's report or notice of change.	☐	☐
22	Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?	☐	☐

General Questions (continued)

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

		Yes	No
23	Did you have foreign income or pay any foreign taxes in 2012?	☐	☐
24 a	At any time during 2012, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	☐	☐
b	Did the aggregate value of all your foreign accounts exceed $10,000 at any time during 2012? Report all interest income on Org 11	☐	☐
25	Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?	☐	☐
26	Did you at any time during 2012, have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded $50,000 in value at any time during the year?	☐	☐

HEALTH AND LIFE INSURANCE

		Yes	No
27	Did you or your spouse have self-employed health insurance?	☐	☐
28	If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?	☐	☐
29	Did your employer pay premiums on life insurance in excess of $50,000 where the proceeds are payable to beneficiaries named by you?	☐	☐
30	Did you contribute to or receive distributions from a Health Savings Account (HSA)?	☐	☐

MISCELLANEOUS

		Yes	No
31	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2012? If **yes,** please attach details	☐	☐
32	Did you start paying mortgage insurance premiums in 2012? If **yes,** please attach details	☐	☐
33	Did you purchase a motor vehicle or boat during 2012? If **yes,** attach documentation showing sales tax paid.	☐	☐
34	Did you purchase a hybrid or electric vehicle in 2012? If **yes,** enter year, make, model, and date purchased: ______________________	☐	☐
35	Did you donate a vehicle in 2012? If yes, attach Form 1098C	☐	☐
36	What was the sales tax rate in your locality in 2012? ________ % State ID . . . ____		
37	Did you or your spouse make gifts of over $13,000 to an individual or contribute to a prepaid tuition plan?	☐	☐
38	Did you make gifts to a trust?	☐	☐
39	If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? If **yes,** please attach details.	☐	☐
40	Did you or your spouse participate in a medical savings account in 2012? If **yes,** please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)	☐	☐
41	Did you make a loan at an interest rate below market rate?	☐	☐
42	Did you pay any individual for domestic services in 2012?	☐	☐
43	Did you pay interest on a student loan for yourself, your spouse, or your dependents?	☐	☐
44	Did you, your spouse, or your dependents attend post-secondary school in 2012?	☐	☐
45	Did a lender cancel any of your debt in 2012? (Attach any Forms 1099-A or 1099-C)	☐	☐
46	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

		Yes	No
47	If your tax return is eligible for Electronic Filing, would you like to file electronically?D	☐	☐
48	The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

Caution: Review transferred information for accuracy.

49 If **yes,** please provide the following information:

a Name of your financial institution . . . . ______________________

b Routing Transit Number (must begin with 01 through 12 or 21 through 32) . . . . ______________

c Account number . . . . ______________

d What type of account is this? . . . . Checking ☐ Savings ☐

☑ Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

Business/Investment Questions

	Question	Yes	No
1	Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2.)	☐	☐
2	Did you buy or sell any stocks or bonds in 2012? If **yes**, attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	☐	☐
3	Did you surrender any U.S. savings bonds during 2012?	☐	☐
4	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
5	Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?	☐	☐
6	Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?	☐	☐
7	Do you have any investments for which you were **not** personally 'at risk' (other than sole proprietorship or farm)?	☐	☐
8	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2012?	☐	☐
9	Did you sell property or equipment on installment in 2012?	☐	☐
10	Did you have any business related educational expenses?	☐	☐
11	Did you do a 'like-kind' exchange of property in 2012?	☐	☐
12	Do you have records, as described below, to support expenses?	☐	☐
	Tax law and IRS regulations allow deductions for travel and entertainment if adequate records can be presented. Information must include: **1** Amount; **2** Time and place; **3** Date; **4** Business purpose; **5** Description of gift(s); and **6** Business relationship of recipient.		
13	Did you purchase special fuels for non-highway use? If **yes**, please list the type of use and the number of gallons for each fuel.	☐	☐
14	Was Form 8903 (Domestic Production Activities Deduction) included in your 2011 federal income tax return?	☐	☐

Basic Taxpayer Information

PERSONAL INFORMATION

	TAXPAYER	SPOUSE
Last name		
First name		
Middle initial and suffix	MI . . . . . . ____ Suffix . . . . . . ____	MI . . . . ____ Suffix . . . . ____
Social security number		
Occupation		
Work phone/extension		
Cell phone		
E-mail address		
Birthdate	MM/DD/YYYY	MM/DD/YYYY . . .
Blind	**Yes** ☐ **No** ☐	**Yes** ☐ **No** ☐
Contribute to Presidential Election Campaign Fund	**Yes** ☐ **No** ☐	**Yes** ☐ **No** ☐
Eligible to be claimed as a dependent on another return	**Yes** ☐ **No** ☐	**Yes** ☐ **No** ☐

Street address . . ____ Apartment number . . . . . . ____
City . . . . ____ State . . . . ____ ZIP code . . . . . . ____
Home phone . . . ____ Foreign country . . . . ____
Fax . . . . ____ Foreign phone . . . . ____

FILING STATUS

☐ **1** Single
☐ **2** Married filing jointly
☐ **3** Married filing separately
Check this box if you **did not** live with spouse at any time during the year . . . . ► ☐
Check this box if you are eligible to claim spouse's exemption . . . . ► ☐
Check this box if your spouse itemizes deductions . . . . ► ☐
☐ **4** Head of household
If the qualifying person is a child but not your dependent, enter
Child's name . . . . ____ Child's social security number . . . . . ____
☐ **5** Qualifying widow(er)
Check the box for the year the spouse died . . . . ► 2010 ☐ 2011 ☐

DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)				Social Security Number / Relationship	**Code / +Months in U.S.	Date of Birth / *Not Citizen	2012 Child Care Expense / 2011 Child Care Expense
						☐	
						☐	
						☐	
						☐	

** For the Dependent Code, enter the following:
L = dependent child who lived with you
N = dependent child who didn't live with you due to divorce or separation
O = other dependent
Q = not a dependent (but is a person who qualifies your client for the earned income credit and/or the credit for child and dependent care expenses)

+ Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.
* Check this box if dependent child is not a U.S. citizen or resident alien

Interest and Dividend Income

T = Taxpayer, **S** = Spouse, **J** = Joint

INTEREST INCOME

► ☑ **Attach all copies of your Form 1099-INTs here.**

**Type of Interest
blank = Regular taxable interest
ME1 = ME bond interest in federal income
MD1 = MD nontaxable interest — taxable federal
MA1 = MA bank interest
NH1 = NH nontaxable interest — taxable federal
NJ1 = NJ nontaxable interest — taxable federal
OK1 = OK bank interest
TN1 = TN nontaxable interest — taxable federal
WV1 = WV bond interest in federal income

TSJ	X*	Payer Name	2012 Box 1 Interest	Type of Interest**	2012 Box 3 US/Treasury Interest	2012 Box 8 Tax Exempt	State	2011 Box 1 + 3

X* Check if you did not receive income from this account in 2012.

DIVIDEND INCOME

► ☑ **Attach all copies of your Form 1099-DIVs here.**

TSJ	X*	Payer Name	2012 Box 1a Ordinary Dividends	2012 Box 1b Qualified Dividends	2012 Box 2a Capital Gains	State	2011 Box 1a + 2a

X* Check if you did not receive income from this account in 2012.

Medical and Tax Expenses

MEDICAL AND DENTAL EXPENSES	2012	2011
1 Prescription medications		
2 Health insurance premiums (enter Medicare B on ORG10)		
3 Qualified long-term care premiums		
a Taxpayer's gross long-term care premiums		
b Spouse's gross long-term care premiums		
c Dependent's gross long-term care premiums		
4 Enter self-employed health insurance premiums on ORG19, ORG27, ORG45A, or ORG46A for the appropriate activity		
5 Insurance reimbursement		
6 Doctors, dentists, etc		
7 Hospitals, clinics, etc		
8 Lab and X-ray fees		
9 Expenses for qualified long-term care		
10 Eyeglasses and contact lenses		
11 Medical equipment and supplies		
12 Miles driven for medical purposes		
13 Ambulance fees and other medical transportation costs		
14 Lodging		
15 Other medical and dental expenses:		
a		
b		
c		
d		
e		
f		
g		
h		
i		
j		

TAXES	2012	2011
Enter state and local income taxes on **ORG7, ORG8, ORG10,** and **ORG40.**		
16 Real estate taxes paid on principal residence		
17 Real estate taxes paid on additional homes or land		
18 Auto registration fees based on the value of the vehicle		
19 Other personal property taxes		
20 Other taxes:		

Interest Paid and Cash Contributions

HOME MORTGAGE INTEREST PAID

Lender's Name	Check if NOT on Form 1098	2012	2011

POINTS PAID ON LOAN TO BUY, BUILD, OR IMPROVE MAIN HOME

Lender's Name	Check if NOT on Form 1098	2012

SELLER FINANCED MORTGAGE

Individual's Name	Identifying Number	Address

OTHER PERSON RECEIVING FORM 1098

Form 1098 Recipient's Name	Address

OTHER POINTS

Enter below any points paid on a home equity loan (other than to improve your main home), a loan for a second home, or a refinanced mortgage.

Lender's Name	Loan Over	Points Paid	Date of Loan	Loan Length (years)	2011 Points Deducted

INVESTMENT INTEREST

	2012	2011
Investment interest (for example: margin interest, interest paid on loans used for property held for investment, etc)		

Interest Paid and Cash Contributions (continued)

LIMITED HOME MORTGAGE DEDUCTION

If your mortgage balance exceeded $1 million ($500,000 for married filing separately) or your home equity debt exceeded $100,000 ($50,000 for married filing separately) during 2012 complete the following:

	Loan 1	Loan 2	Loan 3	Loan 4	Loan 5
1 Interest paid in 2012					
Points paid in 2012					
Months loan outstanding					
Principal pd on loan in 2012					
2 Home acquisition debt: Beginning of year balance					
Additional borrowed in 2012					
3 Home equity debt: Beginning of year balance					
Additional borrowed in 2012					
4 Grandfathered debt: (before 10/14/1987) Beginning of year balance					
Additional borrowed in 2012					

5 Fair market value of homes on date debt was last secured by home . . . . ______

6 Home acquisition and grandfathered debt on date last secured by home . . . . ______

CASH CONTRIBUTIONS

Name of Donee Organization	Check if Statement Exists for Gifts $250 or More	2012	2011
	☐		
	☐		
	☐		
	☐		
	☐		
	☐		
	☐		
	☐		
	☐		
	☐		
Charitable miles driven			
Miles driven to deliver noncash contributions			
Parking fees, tolls, and local transportation			

Noncash Contributions

ORG14A

Copy 1

	Name of Donee Organization	Check if Statement Exists for Gifts of $250 or More	Fair Market Value	Prior Year Fair Market Value
A		☐		
B		☐		
C		☐		
D		☐		
E		☐		
F		☐		
G		☐		
H		☐		
I		☐		

Note: Complete sections below **only** if the **total** noncash contributions are **more than $500.**

	Description of Donated Property	Type**	Address of Donee Organization
A			
B			
C			
D			
E			
F			
G			
H			
I			

	* Method for Fair Market Value	Date of Contribution	Complete these columns **only** for each contribution over $500		
			Date Acquired (month, year)	How Acquired***	Your Cost
A					
B					
C					
D					
E					
F					
G					
H					
I					

*** Methods of determining FMV:**

Appraisal
Average share
Catalog
Capitalization of income
Comparative sales
Consignment shop
Present value
Replacement cost
Reproduction cost
Thrift shop

** **Type of Donated Property**

Household/clothing items
Motor vehicle, boat or airplane
Art, other than self-created
Art, self-created
Collectibles
Business equipment
Business inventory
Stock, publicly traded
Stock, other than publicly traded
Securities, other than stock
Intellectual property
Real property, conservation property
Real property, other than conservation
Other personal property
Other intangible property

*****How Property was Acquired:** Purchase, Gift, Inheritance, Exchange

Miscellaneous Itemized Deductions

MISCELLANEOUS DEDUCTIONS (2% LIMITATION)	2012	2011
Employee Business Expenses		
Note: If you have any travel, transportation, meals or entertainment expenses **or** your employer reimbursed you for **any** of your job-related expenses, complete **ORG17** for **all** your employee expenses.		
1 Union and professional dues		
2 Professional subscriptions		
3 Uniforms and protective clothing		
4 Job search costs		
5 Other unreimbursed employee expenses:		
a ______		
b ______		
c ______		
d ______		
e ______		
Other Expenses Subject to the 2% Limitation		
Treat all MACRS assets for this activity as qualified Indian reservation property? ☐ Yes ☐ No		
Treat all assets acquired after August 27, 2005 as qualified GO Zone property? ☐ Regular ☐ Extension ☐ No		
Treat all assets acquired after May 4, 2007 as qualified Kansas Disaster Zone property? ☐ Yes ☐ No		
Was this property located in a Qualified Disaster Area? ☐ Yes ☐ No		
Check to code assets as Investment Expense ☐		
Use **ORG50** to record dispositions.		
Use **ORG51A** to enter additional assets.		
Use **ORG11a** for investment expenses related to interest income.		
Use **ORG11b** for investment interest related to dividend income.		
6 Tax return preparation fees		
7 Investment counsel and advisory fees		
8 Certain attorney and accounting fees		
9 Safe deposit box rental		
10 IRA custodial fees		
11 Other expenses (list):		
a ______		
b ______		
c ______		
d ______		
e ______		

OTHER MISCELLANEOUS DEDUCTIONS	2012	2011
12 Federal estate tax paid on income in respect of a decedent		
13 Amortizable bond premiums (acquired before 10/23/86)		
14 Gambling losses (to the extent of gambling income)		
15 Unrecovered investment in annuity		
16 Other miscellaneous deductions: ______		

State Information Worksheet

ORG60

GENERAL INFORMATION

	Taxpayer	Spouse
1 Enter your state of residence		

2 Check the appropriate box if:

	Taxpayer	Spouse	
a Full year resident	☐	☐	
b Part year resident	☐	☐	Date of entry: ________ Date of exit: ________
c Nonresident	☐	☐	

3 Resident locality: ____________________

4 County: ____________ School district: ____________ School district number: ____________

	Taxpayer	Spouse
5 Check if disabled	☐	☐

STATE CREDITS

6 **Description/type of credit** (for example, solar energy, carpool)	Code	Amount
a		
b		
c		
d		
e		

VOLUNTARY STATE CONTRIBUTIONS

7 **Description/type of contribution** (for example, wildlife, cancer)	Code	Amount
a		
b		
c		
d		
e		

MISCELLANEOUS QUESTIONS

	Yes	No
8 Did you file a state return for 2011?	☐	☐
9 Do you want state forms and instructions sent to you next year?	☐	☐
10 Do you want any applicable penalty and interest calculated and added to the return?	☐	☐

11 How do you want your state refund (if any) applied?

a Refunded . . . . ☐ **b** Apply to 2013 estimates . . . . . . ☐ **c** Apply to 2013 taxes . . . . ☐

12 Additional state information: ______________________________