2011 PERSONAL INCOME TAX RETURN DATA

The information required on this form is pertinent to the preparation of your INCOME TAX RETURN and relates to you and your family personally, and not to your business operations.

Please complete and return to us as soon as possible BUT NO LATER THAN FEBRUARY 15, 2012. **WE MUST HAVE THIS QUESTIONNAIRE RETURNED TO OUR OFFICE SIGNED AND COMPLETED TO PREPARE YOUR INCOME TAX RETURN.**

You are cautioned that paid bills and cancelled checks claimed by you as deductions herein, must be preserved for a period of at least three years to comply with federal and state tax regulations and audit procedures. Do not claim as deductions any bills that have not been paid during the year unless they were charged to your bank credit card before year end.

If we may be of assistance to you in preparing this form, kindly contact us at (248) 476-7447.

		Social Security Number	Date of Birth	Date of Death
NAMES:	Self ______________________	____________	______	______
	Spouse ______________________	____________	______	______

OCCUPATION: Self ______________________ Spouse ______________________

ADDRESS: List your current mailing address below (↓). **Email address →** ______________________

____

Street City State Zip

_________ _________ _________ _________ Do you live in city limits?

County Township/School District Home Phone Daytime Phone Yes ☐ No ☐

Your marital status as of 12-31-11 ☐ Single ☐ Married

		Yes	No		Yes	No
Do you want $3 to go to the presidential campaign fund? (This will not affect your tax.)	Self	☐	☐	Spouse	☐	☐
If you have a tax refund, do you want it directly deposited into your bank account? If yes, attach a deposit slip or voided check for the account in which you want the deposit made even if it is the same as last year. Make sure the account meets the rules for direct deposit.		☐	☐			
Are you legally blind?	Self	☐	☐	Spouse	☐	☐

DEPENDENTS

Full Name	Date of birth	Social Security Number	Relationship	Months lived in home	Months as a student	% of By you	Support By others

A social security number must be provided. If your children do not live with you, please send a copy of the pre-1985 custodial agreement or Form 8332.

SALARIES & COMMISSIONS . . . SELF AND SPOUSE

Attach your **W-2 Forms** from your employer or **1099** Forms ☐ Number of W-2(s) attached.

Self (T) Spouse (S)	Employer	Federal Wages	Federal tax withheld	State tax withheld	Local tax withheld	State Wages	FICA Wages

ESTIMATED TAX PAYMENTS YOU HAVE MADE

	APRIL 15, 2011 1st QUARTER		JUNE 15, 2011 2nd QUARTER		SEPT. 15, 2011 3rd QUARTER		JAN. 17, 2012 4th QUARTER	
	Date	Amount	Date	Amount	Date	Amounts	Date	Amount	TOTALS
FEDERAL		$		$		$		$	$
STATE		$		$		$		$	$
LOCAL		$		$		$		$	$

INTEREST YOU EARNED (Do not include IRA interest)

☐ Check here if you had a foreign bank account or trust.

TSJ	Check (√) if Tax Exempt	From Whom Received	Amount
			$

DIVIDENDS YOU EARNED

TSJ	From Whom Received	Ordinary Dividends	Qualified dividens	Capital Gains	Non-Taxable	Check (√) if Tax Exempt

Interest income from seller financed mortgage

List name and social security number of payer ____________________

CAPITAL GAINS AND LOSSES

Sales of real estate, personal property, stocks, bonds, etc.

ITEM SOLD Provide broker statements w/ 1099B / cost information	TSJ	DATE ACQ'D	DATE SOLD	SELLING PRICE	COST	GAIN (LOSS)

FOR REAL ESTATE, ENCLOSE SETTLEMENT SHEETS. FOR STOCK SALES, PROVIDE COST OF STOCK AND BROKERAGE STATEMENTS.

RENT AND ROYALTY INCOME

	Address #1	Address #2
Description and address of Property		
GROSS RENTS	$	$
EXPENSES		
Advertising		
Auto and travel (# of miles)		
Cleaning and maintenance		
Commissions		
Insurance		
Legal and professional		
Mortgage interest (Attach 1098 if available.)		
Other interest		
Repairs		
Improvements *Complete schedule		
Supplies		
Taxes		
Utilities		
Other		
What percent of the property did you occupy during 2011?	____%	____%
If vacation home or condo, How may days occupied by You during 2011?	____	____
Number of days rented 2011	____	____
Were you active in the Management of the rental property in 2011?	Yes ☐ No ☐	Yes ☐ No ☐

*SCHEDULE OF IMPROVEMENTS TO RENTALS

Did you make improvements to investment or rental property or purchase furnishings for it?

Date	Description of Asset Purchased	Cost

OTHER INCOME

Partnerships or LLC (Attach K-1) $ ________

Did you materially participate in the partnership or LLC? Yes ☐ No ☐

S-Corporation (Attach K-1) $ ________

Did you materially participate in the S-Corp? Yes ☐ No ☐

Estate or Trust (Attach K-1) $ ________

State income tax refund $ ________

Alimony $ ________

Pension/profit sharing (Attach 1099R/RRB-1099R) Please include all 1099R's

IRA distributions (Attach 1099R) Please include all 1099R's

Unemployment compensation $________ $________

Social security/railroad retirement(Tier II) (Attach Forms SSA-1099/RRB-1099) $________ $________

OTHER INCOME CONTINUED NEXT PAGE

OTHER INCOME (CONTINUED)

* Lottery or other winnings............ $ ____________

Tips (not included in W- 2) .... $ ____________

Other ____________ $ ____________

* Gambling winnings $ ____________

INSTALLMENT SALE INCOME:

Total received this year...................................... $ ____________

Interest included above...................................... $ ____________

Year of sale ____________

If we did not prepare the return for year of sale, please provide Form 6252 for that year..

*** input all gambling losses on page 4.**

ROTH IRA CONVERSION (attach a copy of your 1099R)

1. Did you convert any traditional IRA into any ROTH IRA? Yes ☐ No ☐ If no, go to the next section. If yes, who converted how much?
   Self ____________ Spouse ____________
2. Did you or your spouse ever make a nondeductible IRA contribution? Yes ☐ No ☐ If yes, did we prepare your latest Form 8606?
   Yes No If no, please provide a copy of the most recent Form 8606 for you and your spouse.
   Also provide the end of year value of all traditional IRAs for yourself $ ____________ and your spouse $ ____________

ADJUSTMENTS TO INCOME

IRA, ROTH IRA, KEOGH, SEP, SIMPLE PAYMENTS

Please include statements from Plan Administrators and a copy of any 5498

Are you covered by an employer retirement plan?	SELF	SPOUSE
	Yes ☐ No ☐	Yes ☐ No ☐

PLAN TYPE

____________ $ ____________ $ ____________

____________ $ ____________ $ ____________

Will nondeductible IRA contributions be withdrawn? **Yes** ☐ **No** ☐

OTHER ADJUSTMENTS

Educator expenses.................................. $ ____________

Reservist/Artist ... . $ ____________

Student loan interest paid (Attach 1098-E).............$ ____________

Tuition and fees deduction........................... $ ____________

Archer MSA ....see Medical expenses below

Alimony paid ....$ ____________ Last name and SSN of recipient:

____

Moving expenses (attach list) .... $ ____________

BUSINESS USE OF PERSONAL VEHICLE (Use business questionnaire if appropriate)

Do not complete this part if you have already supplied your employer with your expenses and your reimbursement is not included in your wages.

	Vehicle #1	Vehicle #2
Description		
Date first used for business		
Lower of cost or value at date above		
Odometer reading at year end		
Total miles driven during the year		
Business miles		
Commuting miles		
Business parking and tolls		

The vehicle was used for what business purpose? Employee ☐ Partner ☐

Other ____________

Do you have evidence to support the business miles claimed? Yes ☐ No ☐

Is the evidence in writing? Yes ☐ No ☐

Cost of gas, oil, repairs, lease, etc. . . . Vehicle #1 $ ____________

Vehicle #2 $ ____________

Amount reimbursed by employer $ ____________

MEDICAL EXPENSES ITEMIZED DEDUCTIONS

Med insurance premiums (no pretax employee payments) $ ____________

Long term care insurance ....Taxpayer $ ____________

....Spouse $ ____________

Prescription medicine and insulin.......................... $ ____________

Miles driven for medical care .... ____________ mi.

Other medical transportation and lodging .... $ ____________

Dr. ____________ $ ____________

Dr. ____________ $ ____________

Dr. ____________ $ ____________

Hearing aids .... $ ____________

Eye glasses/contacts .... $ ____________

Nurses .... $ ____________

Lab fees .... $ ____________

Ambulance .... $ ____________

Hospitals (list) ____________ $ ____________

____________ $ ____________

Other (specify) ____________ $ ____________

Less Insurance reimbursement (____________)

Medical savings account (Attach 5498-MSA) $ ____________

For MSA → Individual or Family Coverage?

TAXES

Real estate tax (personal residence) .... $ ____________

Taxable value of home (not SEV).. $ ____________

State sales tax at general rate from receipts .... $ ____________

Special item sales tax i.e. car/boat .... $ ____________

Other real estate taxes (investment property) .... $ ____________

Personal property tax and value added tax on personal vehicles.............. $ ____________

Balance paid with prior year state and / or local return (tax only) .... $ ____________

INTEREST PAID (Do not include rental property. Enter student loan interest in ADJUSTMENTS TO INCOME section.)

Home mortgage paid to financial institution $ ___________

Was any mortgage money used to buy a boat? Yes ☐ No ☐

Was any of the money used for any purpose other than to buy or build your main home and one other? Yes ☐ No ☐

If yes, how much? $ ___________

Home mortgage interest paid to an individual $ ___________

Provide name, address and SSN of payee:

(Attach all Forms 1098) # of 1098s attached_______

Closing points on new home purchase .... $ ___________

Closing points on current year refinance .... $ ___________

How much of the refinance money was used to add improvements to your home? $ ___________

Investment interest... $ ___________

Interest paid to invest in a partnership or S-Corporation that you manage .... $ ___________

* Provide a copy of settlement papers.

CONTRIBUTIONS

PAID TO	AMOUNT/VALUE	PAID TO	AMOUNT/VALUE
______________Church	$ ___________	______________________	$ ___________
Easter seals	$ ___________	______________________	$ ___________
Salvation army	$ ___________	______________________	$ ___________
Scouts	$ ___________	Miles driven for qualified charity	__________mi.

Do you have receipts for all **cash** contributions **over $250**? Yes ☐ No ☐ For **noncash** contributions, provide cost, value and indicate how you determined the value of your donation. For each **noncash** donation valued at **$5,000** or more, do you have an **appraiser's verification**? Yes ☐ No ☐

LOSSES

Did any sudden and unexpected event cause damage to any of your property this year? Yes ☐ No ☐

If yes, attach a sheet with a detailed list of items damaged for each separate event. Please include a description of each item, its cost and its value before and after the unexpected event.

Did you file an insurance claim? Yes ☐ No ☐ I have no insurance coverage ☐

MISCELLANEOUS (Paid personally)

Gambling losses (up to winnings only) $ ___________

Tax preparation $ ___________

Tools $ ___________

Adoption expenses $ ___________

- Check if foreign ☐
- Final date ___________

Job related educational expenses

- Books $ ___________
- Tuition $ ___________

Miles driven (work to school) ___________________

Safe deposit box $ ___________

Union and professional dues $ ___________

Professional publications $ ___________

Uniforms $ ___________

Unreimbursed employee expense $ ___________

(Attach list)

Investment expenses $ ___________

IRA maintenance fee $ ___________

CHILD AND DEPENDENT CARE

IF YOU AND YOUR SPOUSE WORKED, OR ONE WAS A FULL TIME STUDENT, DID YOU HAVE CHILD CARE EXPENSES? YES ☐ NO ☐

Number of qualifying persons cared for in 2011_________Expenses paid in 2011 for 2010: ____________________

Amount of employer provided child care $____________For whom were the 2010 expenses paid? ______________

Name and Relationship of Qualifying Person(s): ____

Amount paid for each: ____

If payments were made to an individual and they totaled more than $1,500 for 2011:

Were services performed in your home? Yes ☐ No ☐ If yes, have you filed wage tax returns? Yes ☐ No ☐

If yes, attach a copy of the W-2(s) you issued.

This information is required for credit to be allowed

Name of each child care provider ____

EIN/SSN of each provider ____

Address of each child care provider ____

OTHER

Did you pay someone more than $1,500 to work in your home in 2011? Yes ☐ No ☐ If yes, how much? ___________

Attach a copy of W-2(s) you issued.

Are there any loans to you or from you, that are in the amount of $13,000 or more, that are interest free?

Yes ☐ No ☐ If yes, what is the date of the loan? ______________and the amount $ ________________

DECLARATION

I HAVE REVIEWED THE INFORMATION GIVEN YOU ON THIS FORM AND, TO THE BEST OF MY KNOWLEDGE, IT IS TRUE, CORRECT AND COMPLETE. I HAVE MAINTAINED THE UNDERLYING RECORDS REQUIRED BY LAW TO SUPPORT THIS INFORMATION AND IT IS READY FOR PREPARATION OF MY INCOME TAX RETURN. I AUTHORIZE YOU/YOUR COMPANY TO PREPARE MY INCOME TAX RETURN AND RETAIN COPIES OF APPROPRIATE DOCUMENTS.

NOTE: PLEASE DO NOT FORGET YOUR SIGNATURE →

Signature ________________________________

Date ___________________________________

Additional Questions

	Yes	No
Personal Information		
Did your marital status change during 2011?	☐	☐
If married, do you and your spouse want to file separate returns?	☐	☐
Did your address change during 2011?	☐	☐
Can you or your spouse be claimed as a dependent by another taxpayer?	☐	☐
Dependents		
Did you receive any Earned Income credit?	☐	☐
If yes how much? $ ________		
Did you pay for childcare while you worked or looked for work?	☐	☐
Do you have any children under age 18 or a full-time student between the ages of 19 and 24 with unearned (investment income) more than $1,800?	☐	☐
Did you adopt a child or begin adoption proceedings during 2011?	☐	☐
Purchases, Sales and Debt		
Did you have any debts canceled, forgiven, or refinanced during 2011? If yes, please attach all 1099's.	☐	☐
Did you start a new business, purchase a new rental property or farm, or acquire any new interest in any partnership or S Corporation during 2011?	☐	☐
Did you sell an existing business, rental property, farm, or any existing interest in a partnership or S Corporation during 2011?	☐	☐
Did you sell, exchange, or purchase any real estate in 2011? If so, please attach closing statements	☐	☐
Did you withdraw any amounts from your IRA or Roth IRA to acquire a principal residence?	☐	☐
Did you take out a home equity loan in 2011? If you, provide closing statement. What were the funds used for? ________	☐	☐
Are you claiming a deduction for mortgage interest paid to a financial institution for which someone else received the form 1098? If yes, provide name, address and ID# of recipient ________	☐	☐
Did you pay any student loan interest during the year?	☐	☐
Itemized Deductions		
Did you contribute property (other than cash) with a fair market value of more that $5,000 to a charitable organization?	☐	☐
Did you incur any casualty or theft losses during the year?	☐	☐
Credits		
Did you purchase a new hybrid or advanced lean-burn vehicle or a plug-in electric vehicle? If yes, provide make, model and date of purchase.	☐	☐
Did you make a purchase of residential energy efficient property in 2011? If so, please mail invoices.	☐	☐
Miscellaneous		
Did you or your spouse contribute to or establish a medical savings account (MSA) in 2011 or a Health Savings Account (HSA)?	☐	☐
Did you pay any individual $1,700 or more to perform household services during the year such as babysitting, cleaning, cookng or gardening?	☐	☐
Were there any changes made to federal or state returns filed in prior years? If yes, provide copies of the changes or correspondence received.	☐	☐
Did you or your spouse contribute to or establish a Roth IRA or convert an existing IRA into a Roth IRA?	☐	☐

	Yes	No
Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?		
Did you withdraw any amounts from a Coverdell Education Savings Account?		
Did you or your dependents incur any post secondary education expenses, such as tuition?		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? If yes, how many months were you covered?		
Did you move to a different home because of a change in the location of your job? If yes, please contact us regarding the possibility of deducting your moving expenses.		
Did you receive unreported tip income of $20 or more in any month of 2011?		
Did you or your spouse receive distributions from long-term care insurance contracts? If yes, please include Form 1099-LTC		
Did you make gifts of more than $13,000 to any individual?		
Did you have any foreign income or pay any foreign taxes during 2011?		
* **Were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or authority over a bank account, securities account, or other financial account in a foreign country?**		
Did you create or transfer money or property to a foreign trust?		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?		
Did you engage in any bartering transactions?		
Were you notified by the IRS or other taxing authority of any changes in prior year returns?		
Do you owe the state any use tax for out of state purchases? If yes, please give total purchased. $		
Are you or your spouse a teacher (K-12th grade) who spent up to $250 on classroom related expenses?		
Did you or your spouse incur job related legal fees?		
Sale of Your Home		
Did you sell your home in 2011?		
If yes, did you (or your spouse if MFJ) own the home as your principal residence for at least two years of the five-year period prior to the sale?		
If yes, did you (and your spouse if MFJ) occupy the home as your principal residence for at least two years of the five-year period prior to the sale?		
Was the home acquired through a tax free (1031) exchange?		
Did you ever use any portion of the home for business purposes?		
Have you or your spouse sold a principal residence within the last two years?		
At the time of sale, was the residence owned by the taxpayer, spouse or both?		
Purchase of Home		
Did you purchase a home in in 2011? If yes, please enclose your closing statement.		
If so, was this a first-time home purchase?		
Severance/Retirement		
Did you retire or change jobs in 2011?		
Did you receive retirement/severance compensation? If yes, date received.		

Notes:

2011 STATE OF MICHIGAN
PERSONAL INCOME TAX QUESTIONNAIRE

	Y	N
♦ Did you make any out of state purchases of goods that you did not pay sales tax on? For example, internet or mail order purchases wouldn't be charged sales tax and these would be subject to State of Michigan – Use Tax.	☐	☐

If so, what was the total purchase price of these goods? $ ______________________

****THE ABOVE QUESTION MUST BE ANSWERED TO COMPLETE YOUR STATE RETURN****

	Y	N
♦ Are you or your spouse deaf, blind, hemiplegic, paraplegic, quadriplegic, or totally & permanently disabled?	☐	☐
♦ Have you purchased or contributed to an existing Michigan Education Trust (MET) or Michigan Educational Savings Plan (MESP) contract during 2011?	☐	☐

If so, how much? $______________________

Deductions & Credits:

♦ If you made a **political** contribution during 2011, please list the amount. $ ____________________

♦ In order to complete the Homestead Property Tax Credit, please fill in the tax information on page 3 of the questionnaire under taxes.

♦ If you would like to make a contribution to one of the following charities please input the amount.

	A. $5	B. $10	C. Other Amount
Animal Welfare Fund	☐	☐	______ 00
Children of Vets Tuition Grant Program	☐	☐	______ 00
Children's Hospital of Michigan Fund	☐	☐	______ 00
Children's Trust - Prevent Child Abuse	☐	☐	______ 00
Military Family Relief Fund	☐	☐	______ 00
United Way Fund	☐	☐	______ 00

♦ If you paid for license tabs on your personal vehicles, please list the year of the vehicle and the cost of the tabs:

Year: ____________ Cost ____________________

Year: ____________ Cost ____________________

Year: ____________ Cost: ____________________

♦ If you paid tuition and fees in 2011 for a student's undergraduate degree to a qualifying college, please list the name of the institution, the amount paid, and the year of college they are in. Qualifying colleges for 2011 are: Bay Mills Community, Henry Ford Community, Oakland Community and ITT Tech schools in Swartz Creek, Troy, Canton, Wyoming and Dearborn.

Name of College	Tuition and Fees	Year of College

Attach a separate schedule if necessary.