We are required to have this form completed and signed as part of your records. Please complete this form and bring it with you when you drop off your materials or meet with your tax preparer. It also helps insure that every deduction and credit is taken on your return.

YES	NO	Tax Year: 2011
		Bring *all* W2s, 1099s for interest and dividends, mortgage interest and property tax records.
		Did you pay estimated tax payments in 2011? Provide dates and amounts paid.
		Final Year For Teachers - **Did you buy supplies for your classroom? Provide receipts.**
		Final Year For Sales Tax Deduction – **Did you buy a new car, boat or airplane? Bring evidence of the sales tax paid.**
		Were there any births, adoptions, separations, divorces, marriages or deaths in your family during the tax year? **We will need a social security number for each dependent**.
		Did you operate a business or own rental property? Provide a summary of all income and expenses. If you have interest in a partnership or Sub-S Corporation, provide all K-1's.
		Did you claim the first-time homebuyer credit that requires annual repayments? Please bring your IRS notice listing the amount you received and the amount you have to repay as additional tax.
		Do you own stocks and/or mutual funds? If so, provide all Form(s) 1099-DIV and year-end statements provided by your investment company.
		Did you sell investments/real estate? Provide all Form 1099-B's and the original purchase date and cost.
		Did you pay Student Loan interest? Please indicate the amount and to whom the monies were paid.
		Did you pay higher education expenses for yourself or a dependent? Provide Form 1098-T for all students and institutions.
		We will need a **mortgage statement** and **all property tax bills** paid and/or assessed on your home in 2011. If you rent we need the total rent you paid and the landlord's name and address.
		Did you make cash or non-cash contributions? Provide a detailed summary of the contributions and to whom they were contributed. ***Remember you must provide a value for your non-cash contributions. Keep in mind that proof of payment is needed for all donations.***
		Did you personally pay for medical expenses/insurance premiums? If so, provide the amounts paid.
		Did you pay child or dependent care expenses? Please provide the name, address and Tax I.D. number of your care provider and the amount you paid for each dependent.
		Did you pay car, truck or boat license fees? Please provide the amounts paid.
		Did you rollover and/or contribute to an IRA for yourself or anyone else – e.g. Roth, Traditional, or 529 Savings Plan? If so, provide amounts contributed and type of plan.
		Michigan - Did you purchase anything online for which you did not pay Michigan sales tax? If so, please provide the amount for each purchase.
		If you are in a refund situation are you interested in having your monies deposited directly to your bank account? Please provide a voided check.

I (We), hereby declare that to the best of my (our) knowledge all income and deductions have been provided to the tax preparer of Yarmak & Co. and are true, correct and complete for the 2011 tax year.

Client Signature: ______________________________ Date:____________________

Client Signature: ______________________________ Date:____________________