


801-756-1110 OFFICE  
801-492-1335 FAX

 **TAXPROS**  
"The Tax Savers"  
P.O. BOX 127  
AMERICAN FORK, UT 84003

9:00 - 6:00 Mon-Sat  
[taxpros1040@hotmail.com](mailto:taxpros1040@hotmail.com)  
[taxpros1040.com](http://taxpros1040.com)

☞ **This is your TAX ORGANIZER FOR 2011** ☞

Please enter your 2011 information in the spaces provided and include all forms listed in Section V that pertain to you. Details are the key to fast preparation and accurate filing. Incomplete information will delay the preparation of your tax return. All fields with a \* are required to be completed with your information. **Please be sure to include your daytime telephone numbers or email so we may contact you if additional information is needed.**

**E-filing of all tax returns is mandatory by the IRS this year. E-filing is FREE; however, Section T must be completed with your direct deposit bank information.**

**All tax return preparation fees must be pre-paid.** Returns will be released only after payment is received. Please complete payment section, Section U, in your tax organizer with your Visa or MasterCard information or include a check and return it with your tax information. **Remember, there is a \$20.00 discount if you mail your information to us.** Fees for clients who request an appointment with a tax preparer will not include this discount.

**We are accepting new clients!** We will not accept new clients who have problems with the IRS or State Tax Commission or new clients with large corporations or partnerships.

**The tax deadline is April 15, 2012.** All money is due to the IRS and state on that date. Your extension is only to file the return, not to pay. Please contact us if you need an extension filed.

Our privacy policy ensures that all information is confidential. We never release information without your consent.

We appreciate your business and are here to serve you. We hope you had a great holiday season and we wish you a successful New Year in 2012!

Thanks again,

Janeen Ledkins & Clyde Roper

**REMEMBER - Send all information to TAX PROS, P.O. BOX 127, AMERICAN FORK, UT 84003**

✓	FINANCIAL / LIFE CHANGE IN 2011	WHERE TO FILL IN INFORMATION
	Please fill in all personal information and bank account information.	Fill in Sec. A, Sec. B, and Section T (important)
	Did your address change?	Complete Section A, N & O.
	Did you refinance a mortgage?	Include 1098 and closing papers form escrow
	Did you receive correspondence from the IRS or State Tax Agency?	Please include all letters.
	Did your marital status change?	Complete Section A
	Did any of your children shown as dependents claim themselves on their own return?	Complete Sections A & B
	Do you have a second job or self employment?	Complete Sections S
	Did you receive payments from a pension, 401K, profit sharing plan or IRA?	Complete Section D, include 1099s.
	Did you sell stock during the year?	Complete Section F, include 1099-Bs
	Did you have any unreimbursed employee business related expenses?	Complete Section P
	Do you have a rental property? If so was it sold in 2011?	Complete Sections G
	Did you, your spouse, or any dependents attend college?	Complete Section R, include 1098-T
	Did you pay interest on a student loan?	Complete Section H
	Did you pay or receive alimony?	Complete Section D or Section H