

Butler, Jones & Hansen, P.C.

Certified Public Accountants

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The 2010 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2010 income tax returns. Please complete the organizer sections, including the questionnaire, as appropriate, and provide supporting documentation where necessary. Be sure and sign the questionnaire.

Please provide us with the following additional information:

- A copy of your 2009 tax return, if not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, trusts, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

Thank you for your help in the completion of the Tax Organizer. Please contact us if you need further assistance or have any questions concerning any of these or other items.

Sincerely,

BUTLER, JONES & HANSEN, PC
Certified Public Accountants

If any of the following items pertain to you or your spouse for 2010, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2010? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2010? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 19 or full-time students under age 24 at the end of 2010, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900? |

INCOME

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any gambling/lottery income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any rental or royalty income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you reported all business income to us, including income not reported on Form 1099 or Schedule K-1? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any gifts or inheritance? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any other sources of income that have not been reported to us? |

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US

Miscellaneous Questions

PURCHASES, SALES AND DEBT

- Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Did you buy or sell any stocks, bonds or other investment property in 2010?
- Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2011?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
- Did you purchase a main home before October 1, 2010 (entering into a binding contract before May 1, 2010) and you (and your spouse) did not own any other home during the 3-year period ending on the date of purchase?
- Did you purchase a main home before October 1, 2010 (entering into a binding contract before May 1, 2010) which replaced a main home that you (and your spouse) maintained for 5 consecutive years during the 8-year period before this latest purchase?
- Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?
- Did you purchase a new alternative motor vehicle (hybrid, advanced lean burn, fuel cell, plug-in)?
- Did you have any debts cancelled, reduced or forgiven, including credit card debt?
- Does anyone owe you money which has become uncollectible?

RETIREMENT PLANS

- Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
- Did you transfer or rollover any amount from one retirement plan to another retirement plan?
- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?

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US

Miscellaneous Questions

EDUCATION

- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

ITEMIZED DEDUCTIONS

- Did you incur a loss because of damaged or stolen property?
- Did you work out of town for part of the year?
- Did you use your car on the job (other than to and from work)?

ESTIMATED TAXES

- Did you apply an overpayment of 2009 taxes to your 2010 estimated tax (instead of being refunded)?
- If you have an overpayment of 2010 taxes, do you want the excess applied to your 2011 estimated tax (instead of being refunded)?
- Do you expect your 2011 taxable income and withholdings to be different from 2010?

MISCELLANEOUS

- Do you NOT want to electronically file your tax return?
- Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- May the IRS discuss your tax return with your preparer?
- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
- Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
- Was your home rented out or used for business?

2010	1040	US	Miscellaneous Questions
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- Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

- Did you incur moving expenses due to a change of employment?

- Did you engage the services of any household employees?

- Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

- Did you or your spouse make any gifts to an individual that total more than \$13,000, or any gifts to a trust?

- Did you receive a \$250 economic recovery payment in 2010 that was made to social security recipients, railroad retirement recipients and certain veterans? Caution: Most eligible recipients received the \$250 payment in 2009 instead of 2010. Check the box only if the payment was received in 2010.

- Did your spouse receive a \$250 economic recovery payment in 2010 that was made to social security recipients, railroad retirement recipients and certain veterans? Caution: Most eligible recipients received the \$250 payment in 2009 instead of 2010. Check the box only if the payment was received in 2010.

- Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2010?

- Did you engage in any bartering activities?

Signature _____

Date _____

2010

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US

Tax Organizer

Butler, Jones & Hansen, PC
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 Fax number: 480-497-0622
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Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2010 tax return. Please enter all pertinent 2010 information. If you have attached a government form for an item, check the box and do not enter a 2010 amount.

CLIENT INFORMATION

Taxpayer

Spouse

First name and initial.....		
Last name.....		
Title/suffix.....		
Social security number....		
Occupation.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
1=blind.....		
Home phone.....		
Work phone.....		
Work extension.....		
Cell phone.....		
E-mail address.....		

Address	In care of.....	
	Street address.....	
	Apartment number.....	
	City.....	
	State.....	
	ZIP code.....	

DEPENDENTS

Dependent No.

Dependent No.

First name.....		
Last name.....		
Title/suffix.....		
Date of birth (m/d/y).....		
Social security number....		
Relationship.....		
Months lived at home.....		

WAGES, SALARIES AND TIPS

Employer Name:

2010 Amount

2009 Amount

Attach Forms W-2

INTEREST INCOME

Payer Name:

Attach Forms 1099-INT

Please enter all pertinent 2010 information. If you have attached a government form for an item, check the box and do not enter a 2010 amount.

DIVIDEND INCOME

Payer Name:

Form with two lines for Payer Name and a checkbox.

2010 Amount

2009 Amount

Attach Forms 1099-DIV

Table with 2 columns for 2010 and 2009 amounts.

PENSION AND IRA INCOME

Payer name:

Form with two lines for Payer name and a checkbox.

Attach Forms 1099-R

Table with 2 columns for 2010 and 2009 amounts.

GAMBLING WINNINGS

Payer name:

Form with two lines for Payer name and a checkbox.

Attach Forms W-2G

Table with 2 columns for 2010 and 2009 amounts.

Total gambling losses.....

Winnings not reported on Form W-2G.....

Table with 2 columns for 2010 and 2009 amounts.

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history).....
Form 1099-MISC - Miscellaneous income.....
Form 1099-S - Sales of real estate (also include closing statements).....
Form 1099-G - State tax refunds.....

Attach Forms 1099

Table with 2 columns for 2010 and 2009 amounts.

Attach Forms 1099

Table with 2 columns for 2010 and 2009 amounts.

Taxpayer:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Attach Forms 1099

Table with 2 columns for 2010 and 2009 amounts.

Spouse:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Attach Forms 1099

Table with 2 columns for 2010 and 2009 amounts.

MISCELLANEOUS INCOME

Alimony received.....

Spouse: Alimony received.....

Other:

Form with two lines for Other income.

Table with 2 columns for 2010 and 2009 amounts.

Table with 2 columns for 2010 and 2009 amounts.

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer:

Traditional IRA contributions (1=maximum).....

Roth IRA contributions (1=maximum).....

Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

Table with 2 columns for 2010 and 2009 amounts.

Please enter all pertinent 2010 information. If you have attached a government form for an item, check the box and do not enter a 2010 amount.

RETIREMENT PLAN CONTRIBUTIONS (Continued)

Spouse:

- Traditional IRA contributions (1=maximum)
Roth IRA contributions (1=maximum)
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

Table with 2 columns: 2010 Amount, 209 Amount

OTHER GOVERNMENT FORMS - DEDUCTIONS

- Form 1098-E - Student loan interest
Form 1098-T - Tuition and related expenses

Table with 2 columns: Attach Forms 1098, empty cell

ADJUSTMENTS TO INCOME

Taxpayer:

- Self-employed health insurance premiums
Educator expenses
Expenses from rental of personal property

Table with 2 columns for 2010 and 2009 amounts

Other adjustments to income:

Blank lines for other adjustments to income

Table with 2 columns for 2010 and 2009 amounts

Alimony Paid - Recipient name & SSN

Blank line for alimony recipient name and SSN

Table with 2 columns for 2010 and 2009 amounts

Spouse:

- Self-employed health insurance premiums
Educator expenses
Expenses from rental of personal property

Table with 2 columns for 2010 and 2009 amounts

Other adjustments to income:

Blank lines for other adjustments to income

Table with 2 columns for 2010 and 2009 amounts

Alimony Paid - Recipient name & SSN

Blank line for alimony recipient name and SSN

Table with 2 columns for 2010 and 2009 amounts

MEDICAL AND DENTAL EXPENSES

- Prescription medicines and drugs
Doctors, dentists and nurses
Hospitals and nursing homes
Insurance premiums
Taxpayer: Long-term care premiums
Spouse: Long-term care premiums
Insurance reimbursements
Out-of-pocket lodging and transportation expenses
Number of medical miles

Table with 2 columns for 2010 and 2009 amounts

Other:

Blank lines for other medical and dental expenses

Table with 2 columns for 2010 and 2009 amounts

TAXES PAID

- State income taxes - 1/10 payment on 2009 state estimate
State income taxes - paid with 2009 state extension
State income taxes - paid with 2009 state return
State income taxes - paid for prior years and/or to other states

Table with 2 columns for 2010 and 2009 amounts

Please enter all pertinent 2010 information. If you have attached a government form for an item, check the box and do not enter a 2010 amount.

TAXES PAID (Continued)

City/local income taxes - 1/10 payment on 2009 city/local estimate.....
 City/local income taxes - paid with 2009 city/local extension.....
 City/local income taxes - paid with 2009 city/local return.....
 State and local sales taxes paid (except autos and special items).....
 Use taxes paid on 2010 purchases.....
 Use taxes paid on 2009 state return.....

2010 Amount	2009 Amount

Taxes Pd in 2010 on New Motor Vehicles Purchased 02/17/2009 - 12/31/2009

Attach Vehicle/Tax Information

Sales tax on autos not included above.....
 Sales taxes paid on boats, aircraft and other special items.....
 Real estate taxes - principal residence.....
 Real estate taxes - property held for investment.....
 Foreign income taxes.....

Other:

Personal property taxes (including automobile fees in some states).....

Attach Tax Notice

INTEREST PAID

Home mortgage interest and points paid

Attach Forms 1098

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee)

Points not reported on Form 1098

Mortgage insurance premiums on post 12/31/06 contracts.....

Investment interest (interest on margin accounts):

Passive Interest.....

CASH CONTRIBUTIONS

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

Volunteer Expenses (out-of-pocket).....

Number of charitable miles.....

Please enter all pertinent 2010 information. If you have attached a government form for an item, check the box and do not enter a 2010 amount.

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

	2010 Amount	2009 Amount

MISCELLANEOUS DEDUCTIONS

- Union and professional dues.....
- Tax return preparation fee.....
- Safe deposit box rental.....
- Investment expenses.....
- Estate tax, section 691(c).....

Unreimbursed employee expenses:

Other:
