Biwan & Biwan, S.C.
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Sheboygan, WI 53081
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2011 Client Organizer

ALL TAXPAYERS MUST SIGN THE ENGAGEMENT LETTER ON PAGE 6 AND COMPLETE THE 3 PAGE QUESTIONNAIRE BEFORE WE CAN BEGIN PREPARING YOUR TAX RETURNS!

,

Dear :

This Client Organizer is designed to help you gather tax information needed to prepare your 2011 personal income tax return. We have preprinted certain information from your 2010 personal income tax return to help you complete the organizer with minimal time and effort.

In your Client Organizer, all social security numbers and bank account numbers have been replaced with asterisks (***-**-****) and (****1234) to protect your privacy and personal information. If you need to change or update a social security number or bank account information, please contact our office. **When you receive your completed tax return(s), please review all social security numbers and bank account information for accuracy. Report any discrepancies to our office immediately.**

Enter 2011 information on the Client Organizer sheets provided. If any information does not apply to you or is incorrect, please draw a line through it or make the necessary corrections.

The Client Questionnaire asks about pertinent tax items necessary for preparing the most accurate tax return possible. Please answer all applicable questions and attach a statement when necessary for additional information not provided in the Client Organizer. **The client questionnaire must be completed and the engagement letter signed by all taxpayers BEFORE we can start processing your return.**

Please include the documents listed below with this organizer when you return it to our office:

Documents

Completed checklist
Forms W-2 wages, salaries and tips
Forms W-2G gambling winnings
Forms 1099-INT interest income
Forms 1099-DIV dividend income
Forms 1099-PATR taxable distributions received from cooperatives
Forms 1099-OID original issue discount
Forms 1099-MISC miscellaneous income
Forms 1099-R retirement income
Forms 1099-G unemployment compensation or state tax refunds
Forms 1099-B stock sales
Forms 1099-SSA social security income

Forms 1099-LTC Long-term care and accelerated death benefits
Brokerage statements showing investment transactions for stocks, bonds, etc.
Closing statements from the sale or purchase of real estate including residence
Schedule K-1 showing income from partnerships, S corporations, estates and trusts
Forms 1098 Statements supporting deductions for mortgage interest
Statements supporting real estate taxes paid in 2011
Forms 1098-T tuition expenses
Forms 1098-E student loan interest
Forms 5498-SA and/or 1099-SA for Health Savings Accounts (HSA's)
Legal papers for adoption, divorce, or separation involving custody of your dependent children.
Any tax notices sent to you by the IRS, Wisconsin Department of Revenue, or other taxing authority.
A copy of your income tax return from last year, **if not prepared by this office**.
Voided check for account where refunds should be direct deposited, if different.

2011 1040 Income Tax Annual Engagement Letter

Biwan & Biwan, S.C. is pleased to provide you with professional tax services. This engagement letter embodies the entire agreement regarding the services to be rendered by our firm to you. This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. The Internal Revenue Service imposes penalties on taxpayers, and on us as return preparers, for failure to observe due care in reporting for income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We are pleased to be selected to prepare your 2011 **Federal and resident state(s)**, if applicable, income tax returns from information you will furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask for clarification of some of the information. We will furnish you with an organizer and checklist to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked. **We are responsible for preparing only the returns listed specifically in this letter. If you have taxable activity in a state other than that specifically listed you are responsible for providing our firm with all information necessary to prepare any additional applicable state(s) or local income tax returns as well as informing us of the applicable states.** Any additional state income tax returns will be prepared as a separate engagement. If you have income tax filing requirements in a given state but do not file a return, there could be possible adverse ramifications such as an unlimited statute of limitations, penalties etc. If you would like us to investigate to determine each state where you have an income tax filing requirement please inform us.

If you have assets from a foreign country, you may be required to file form TD F 90-22.1 Report of Foreign Bank and Financial Accounts by June 30, 2012. The penalties for failure to file this return are significant. Please contact us if you need more information or need help with this filing requirement. This would be undertaken as a separate engagement.

The initial filing due date for your tax return is April 17, 2012. We expect to begin the preparation of your returns upon receipt of the completed 2011 tax organizer, checklist and all tax documents requested either in the organizer or by our office. All taxpayers must sign the engagement letter before we can begin preparing your tax returns. Our services will be concluded upon delivery to you of your 2011 federal and resident state(s) tax returns for your review and filing with the appropriate taxing authorities.

You agree that in the event your return cannot be completed by the due date, it may become necessary for us to apply to extend the due date. Extensions are required when we do not receive information needed to prepare a return on a timely basis. Applying for an extension of time to file does NOT extend the time to pay your tax but it may extend the time available for a government agency to undertake an audit of your return or may extend the statute of limitations. Additionally, extensions may affect your liability for penalties and interest or compliance with government deadlines. We are available to discuss this matter with you at your request at our regular hourly fee should the need arise.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain, in your records, the documentation necessary to support the data used in preparing your tax returns, including but not limited to cancelled checks and other data that form the basis of income and deductions, auto, travel, entertainment, and related expenses and the required documents to support charitable contributions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. If you have any questions as to the type of records required, please ask us for advice in that regard. **You have the final responsibility for the income tax returns and therefore, you should review them carefully before you sign them.** We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties and interest. We will rely, without further verification, upon information you provide to us from 3rd parties including, but not limited to, K-1's, 1099's, 1098's, receipts and similar items.

Our work in connection with the preparation of your income tax returns cannot be relied on to detect errors, fraud, or illegal acts that may exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We do not administer any retirement plans, cafeteria plans or HSA's. Employer matching, eligibility, and other plan requirements are the responsibility of the employer.

We will use our professional judgment in preparing your returns. Whenever we are aware that there is a possibility that an applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (i.e., tax agencies and courts), we will explain the possible positions that may be taken on your return. We will follow whatever position you request on your return, so long as it is consistent with the codes and regulations and interpretations that have been promulgated. If the Internal Revenue Service, Wisconsin Department of Revenue, or other taxing authority should later contest the position taken, there may be an assessment of additional tax, plus interest and penalties. We assume no liability for any such additional penalties or assessments.

Recent federal legislation made significant changes to the responsibilities of tax return preparers. These changes also apply to non-signing preparers when they provide tax advice. Our services are performed in accordance with these and our other professional responsibilities. Accordingly, we may not provide tax advice or sign a tax return unless we believe that the material positions reflected therein are supported by appropriate authority, or when required, are adequately disclosed.

The taxpayer accuracy-related penalty remains unchanged with penalties applying to tax return positions not having "substantial authority" for being sustained on their merits, absent adequate disclosure. We will advise you of potential disclosure issues that come to our attention. The cost of additional time that may be required in connection with evaluation or disclosure of return positions will result in an additional charge.

Treasury regulations require that taxpayers disclose to the Internal Revenue Service their participation in certain "reportable transactions". These transactions include certain tax strategies/transactions that the Internal Revenue Service has identified as "Listed Transactions", any substantially similar transactions and other types of potentially abusive transactions including "Transaction of Interest" and "Patented Tax Transactions". In addition, certain states tax shelter rules require taxpayers to file reportable transaction disclosure statements with the appropriate state income and franchise tax returns if applicable. Failure to disclose any of these strategies/transactions may result in the imposition of penalties. In connection with the performance of tax services covered by this Agreement you agree to advise us to all listed (or substantially similar) and non-listed reportable transactions based upon information that comes to your attention. We cannot take responsibility for the identification of reportable transactions. Biwan & Biwan, SC will not be liable for any penalties that may be incurred with respect to failure to disclose reportable transactions.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred. If you would like information on the amount or the circumstances of these penalties, please contact us.

It is our policy to keep records related to this engagement for four years after which they are destroyed. Physical deterioration or catastrophic events may shorten the time during which our records will be available. However, we do not keep any original client records, so we will return those to you at the completion of services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies.

In the interest of facilitating our services to you, we may communicate by facsimile transmission or send electronic mail over the internet. Such communications may include information that is confidential to you. While we will use our best efforts to keep such communications secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and consent to our use of these electronic devices during this engagement.

From time to time during our relationship, you may seek our advice with regard to potential investments. We are not investment advisors. Accordingly, we suggest that you seek the advice of qualified investment advisors appropriate to each investment being considered. We will not advise you regarding the economic viability or consequences of an investment or whether you should or should not make a particular investment.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. Invoices for these fees will be payable on presentation.

We reserve the right to suspend or terminate our work in the event we do not receive timely payment of our invoices. This suspension or termination of our work may cause you to fail to meet deadlines imposed by governments, lenders or other third parties or may result in other adverse consequences and is a proper consequence of nonpayment of our invoices. Should payment not be made in a timely manner and Biwan & Biwan, S.C. is required to pursue collection efforts, you will be responsible for all costs of collection, including reasonable attorneys' fees, plus interest at 1.5% per month on the unpaid overdue balance.

In recognition of the relative risks and benefits of this agreement to both the client and the accounting firm, the client and the accounting firm have discussed and have agreed on the fair allocation of risk between them. As such, the client agrees, to the fullest extent permitted by law, to limit the liability of the accounting firm to the client for any and all claims, losses, costs and damages of any nature whatsoever, so that the total aggregate liability of the accounting firm to the client shall not exceed the accounting firm's total fee for services rendered under this agreement. The client and the accounting firm intend and agree that this limitation apply to any and all liability or cause of action against the accounting firm, however alleged or arising, unless otherwise prohibited by law. Both parties agree that there is a one-year limitation period to bring a claim against us for errors and omissions. The one-year period will begin upon the date of the tax professional's signature on the tax returns covered by this engagement letter.

If the foregoing fairly sets forth your understanding, please have all taxpayers sign the next page of this letter in the space indicated. If there are other accounting/tax services you would like us to perform, please inform us by noting so at the end of this letter.

We want to express our appreciation for this opportunity to be of service to you.

Biwan & Biwan, S.C. Privacy Policy

CPAs, like all providers of personal financial services, are now required by law to inform their customers of their policies regarding privacy of customer information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Types of Nonpublic Personal Information We Collect

Information we receive from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services. Information about your transactions with us, our affiliates, and others, and information we may receive from outside agencies such as banks and brokerage houses.

Parties to Whom We Disclose Information

For current and former customers, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include: providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you, requirements to comply with Federal, state or local laws and licensing rules, requirements to disclose information in response to legal subpoenas, items you permit or request us to disclose, as authorized by you, information, which you authorize us to disclose to electronically file your tax return, and information, which you authorize us to disclose that discloses that you are our customer, without disclosure of financial or other personal information. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Customers' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. Our off site shredding contractor handles our confidential documents in bulk for destruction in a secure facility. The contractor is bonded and bound by the same confidentiality laws as our firm.

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Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

We appreciate the opportunity to serve you. Please date and sign below to acknowledge your agreement with and acceptance of your responsibilities and the terms of this engagement. **It is our policy to initiate services after we receive the executed engagement letter.** If any provision of this agreement is declared invalid or unenforceable, no other provision of this agreement is affected and all other provisions remain in full force and effect.

Sincerely,

Biwan & Biwan, S.C.

Sign your Name:________________________ ________________________

Date:______________________________

I have read, understand and accept the conditions of the engagement letter discussed above and the privacy policies attached hereafter.

IRS CIRCULAR 230 DISCLOSURE REQUIREMENT: IRS Circular 230 requires us to notify you that any tax advice contained in this communication (including attachments) is not intended or written to be used, and cannot be used, by any person for the purpose of avoiding tax penalties that may be imposed by law.

WE CAN NOT PREPARE YOUR RETURN WITHOUT THIS CHECKLIST!

Please check the appropriate box and include all necessary details!

Personal Information	**Yes**	**No**
Did your marital status change during the year? If yes, explain: ________________	p	p
Did your address change from last year? If so, did your residency change?	p	p
Can you be claimed as a dependent by another taxpayer?	p	p
Did anyone who is not your dependent live with you more than 6 months?	p	p
Did you change the bank account used to direct deposit your refund?	p	p
Dependent Information		
Were there any changes in dependents from the prior year? If yes, explain: ________	p	p
Do you have dependents who must file a tax return?	p	p
Did any of your dependents file their own return on which they claimed themselves?	p	p
Did you provide over half the support for any other person(s) during the year?	p	p
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $1,900?	p	p
Did you pay for childcare while you worked or looked for work? If yes, provide the provider's name, address, social security number and amount paid.	p	p
If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	p	p
Income Information		
Did you receive any income from property sold prior to this year?	p	p
Did you receive a payment from a pension, profit sharing or 401(k) plan?	p	p
Did you make any withdrawals from an IRA, Keogh, SIMPLE, SEP or other retirement account?	p	p
Did you receive any disability income, unemployment compensation, or social security benefits during the year?	p	p
Did you have any additional income not previously disclosed, including tips?	p	p
Did you exercise or sell any stock options?	p	p
Did any of your life insurance policies mature, or did you surrender any policies?	p	p
Did you engage in any bartering transactions?	p	p
Did you receive or pay alimony/separate maintenance (not child support)? If yes, amount $__________	p	p
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?	p	p
Foreign Income		
Did you have any foreign income or pay any foreign taxes (not included in your brokerage accounts) during the year?	p	p
Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?	p	p
Deduction Information		
Did you contribute to a Health Savings Account (HSA)? If yes, (single or family) deductible $___________contributions $____________ withdrawals used for medical expenses $____________ other expenses $ ______________	p	p
Did you pay health insurance premiums (post tax) for yourself and/or your family? If yes, dollar amount for the year __________ To whom paid ____________	p	p
Did you pay long-term health care premiums for yourself or your family?	p	p
Did you make any COBRA health care coverage continuation premiums?	p	p
Did you pay 2010 or 2011 real estate taxes on your principal residence in 2011? If so, list exactly what was paid and bring in your real estate tax bills.________	p	p
Do you have evidence to substantiate ALL charitable contributions?	p	p
Did you make any noncash charitable contributions (clothes, furniture, vehicles, etc.)?	p	p
Did you incur a casualty or theft loss during the year?	p	p
Did you have any unreimbursed employee expenses?	p	p
Did you use your car on the job for other than commuting?	p	p
Do you have contemporaneous records maintained for the business use of auto?	p	p
Did you work out of town for part of the year?	p	p
Did you make any major purchases during the year (cars, boats, etc.)?	p	p
Did you purchase classroom materials while employed in a school system?	p	p
Did you pay any timeshare interest or taxes?	p	p

Purchases, Sales and Debt Information	**Yes**	**No**
Did you start a new business or purchase rental property during the year?	p	p
Did you sell or dispose of an existing business, rental, or other property this year?	p	p
Did you have any debts cancelled, forgiven, foreclosed upon or refinanced during the year?	p	p
Did you acquire a new or additional interest in an LLC, partnership or corporation?	p	p
Did you sell, exchange, or purchase any real estate during the year? (Send closing statement)	p	p
Did you purchase/sell a principal residence during the year? (Provide HUD statement)	p	p
Did you foreclose or abandon a principal residence or real property during the year?	p	p
Did you acquire or dispose of any stock during the year? (Send original cost basis, sale price, and dates)	p	p
If disposed, did you repurchase substantially identical stock within 30 days before or after the sale in any of your accounts, including retirement accounts?	p	p
Did you have any worthless stock during the year?	p	p
Did you take out a home equity loan or line-of-credit this year? Provide details on what proceeds were used for. Provide closing statement.	p	p
Did you refinance a principal residence or second home this year? Provide details on what proceeds were used for. Provide closing statement.	p	p

Retirement Account Information		
Did you convert an existing IRA to a Roth IRA during 2010 and postpone the taxes?	p	p
Did you convert an existing IRA to a Roth IRA during 2011?	p	p
Did you recharacterize an IRA conversion during 2011?	p	p
Have you ever made a non-deductible IRA contribution?	p	p
Have you, or do you want to contribute to an IRA, Roth IRA, or SEP IRA for 2011 calendar year, due by 4/15/12?	p	p
Did you or your spouse turn age 70 1/2 during the year and have money in an IRA or other retirement account without taking a distribution?	p	p
If you were over 70 1/2, did you make a charitable contribution directly from an IRA?	p	p

Miscellaneous Information		
Did you make gifts of more than $13,000 to any individual?	p	p
Did you receive correspondence from the State or the Internal Revenue Service? If yes, explain: ____	p	p
Did you pay a household employee more than $1,700 for services performed in your home during the year? (Does not include contractors)	p	p
Do you expect significant changes in income, expenses or dependents for 2012? If yes, explain: ____	p	p

Education Information		
Did you pay any tuition and/or required fees for post-secondary education? If yes, provide the 1098-T received and separate amounts paid for tuition, room & board and books. What year in school were these expenses for? ______________	p	p
Did you pay student loan interest during the year?	p	p
Did you contribute to a 529 College Savings Plan? If yes, what state plan? _______	p	p
Did you contribute to a Wisconsin Edvest Program?	p	p
Did you contribute to a Coverdell education savings account?	p	p
Did you make any withdrawals from an education savings/529 Plan account?	p	p
Did you cash any Series EE or Series I U.S. Savings bonds issued after 1989?	p	p
Did your college student receive any taxable scholarships?	p	p

Credit Information		
Did you pay any expenses related to the adoption of a child during the year?	p	p
Did you purchase a hybrid (gas/electric) vehicle? If yes, list make, model and year.	p	p
Did you make any energy efficient improvements to your main home in 2011? Please provide details - invoice, amount paid, etc	p	p
If yes, did you claim any energy property credits in years 2006 - 2010? If so, how much? _____________	p	p
Did you claim the homebuyer credit in a previous tax year? If yes, what year? _____________	p	p

Wisconsin Information

Did you make any out-of-state purchases (by telephone, internet, mail, in person) that the seller did not collect state sales or use tax?	p	p
Did you pay rent? If yes, $__________________ Was heat included? Y or N?	p	p
Did you reinvest proceeds from a sale of assets considered long term capital gain into a qualified new business or qualified Wisconsin business?	p	p

Please complete ONLY if you own a Schedule C business, a farm, or rental property
(Excludes Partnerships and Corporations)

Business, Farm, and Rental Owners	**Yes**	**No**
Do you have anything different this year?	p	p
Did you materially participate in the operation of the business during the year?	p	p
If so, how many hours? ________________		
Did you start a new retirement plan this year?	p	p
If so, what type of plan? ________________		
Did you pay health insurance premiums for your employees this year?	p	p
Are you or your spouse eligible to be covered under an employer's health plan at another job? If yes, for how many months? ___________	p	p
Do you have contemporaneous records maintained for the business use of your auto?	p	p
Do you have any independent contractors?	p	p
If yes, did you file 1099s?	p	p
Did you purchase or construct any equipment or buildings during the year?	p	p
If so, please provide details: _____________________________		
Did you make any large repairs during the year?	p	p
If so, please provide details: _____________________________		
Were any assets sold, retired or converted to personal use during the year?	p	p
If so, please provide details: _____________________________		
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year? If so, how many gallons? _________	p	p
What type of fuel (diesel, gasoline, etc)? ____________		
Do you have inventory at the end of the year? If so, how much $ _________?	p	p
Did you pay your child in the course of your trade or business?	p	p
Did you utilize an area of your home for business purposes?	p	p
Did you increase the number of full-time equivalent employees?	p	p
If so, please provide details: _____________________________		
Did you relocate your business to Wisconsin during the year?	p	p
If yes, did you do business in Wisconsin during 2009 and 2010?	p	p
Did you reimburse an employee for tuition they paid to attend a qualified post-secondary institution in which they graduated in 2011?	p	p
Bring a copy of your LLC Annual Report filed with the WI Dept of Financial Inst.	p	p

(before 07/01/2011)		(after 06/30/2011)			
2011 Mileage Rates		**2011 Mileage Rates**		**2012 Mileage Rates**	
Business	**$.51**	Business	**$.555**	Business	**$.555**
Charitable	**$.14**	Charitable	**$.14**	Charitable	**$.14**
Medical	**$.19**	Medical	**$.235**	Medical	**$.23**

See www.biwancpa.com for updates as they become available.

These are the questions most often asked financial planners. If any of these or any other questions keep you up at night or are of concern to you, please contact your financial professional. If you don't have one, please ask us for recommendations.

1) Do you have a will? Do you review it periodically? Yes No
   a. Signature Date ____/____/________
   b. Last date reviewed ____/____/________

2) What other legal documents have you formalized?
   a. Durable Financial Powers of Attorney? Yes No
   b. Medical Powers of Attorney? Yes No
   c. Living Will? Yes No
   d. Revocable Living Trust? Yes No

3) Have you reviewed beneficiaries, TOD (transfer on death), and POD (payable on death) designations for all accounts within the past 3 years? Yes No

4) Does the executor of your estate know the location of your important financial information, non-financial information and valuables? Yes No

   Do you have a list of all web sites, user names, passwords, and security questions stored in a safe place? Yes No

   Do you have a list of all bills paid electronically with the website, username and passwords? The list should include banks, brokerage accounts, insurance, credit cards, debit cards, department store cards, utilities, online activities, etc. Yes No

5) Do you have a mortgage? Yes No

a.	Balance	__________	__________	__________
b.	Interest Rate	__________%	__________%	__________%
c.	Maturity in years	__________	__________	__________
d.	When last financed (year)	__________	__________	__________

   If refinanced, what did you use the refinancing proceeds for? ______________________

6) Do you own life insurance? Yes No
   a. If yes, amount ____________________
   b. Original purpose ____________________
   c. Has this changed? (How?) ____________________

7) Is your income protected from disability? Yes No
   a. What percentage of income is protected? ________%
   b. Starting when? ______________________
   c. Ending when? ______________________

8) Do you have long-term care insurance? If so, how much? Yes No

9) Do your investments match your risk tolerance? Yes No
   a. Last reviewed ____/____/________
   b. Investment Advisor _______________________

10) Do you have a trusted financial advisor and meet periodically? Yes No
   a. Last meeting date ____/____/________

11) Would you like to know the effects of current or proposed tax laws on your estate? Yes No

12) If you have a business, do you have a buy-sell agreement? Yes No

Form ID: 1040

Personal Information

Filing (Marital) status code (1 = Single, 2 = Married filing joint, 3 = Married filing separate, 4 = Head of household, 5 = Qualifying widow(er)) ___[1]
Mark if you were married but living apart all year ___[2]
Mark if your nonresident alien spouse does not have an Individual Taxpayer Identification Number (ITIN) ___[3]

	Taxpayer	Spouse
Social security number	___[4]	___[5]
First name	___[6]	___[7]
Last name	___[8]	___[9]
Occupation	___[10]	___[11]
Designate $3.00 to the presidential election campaign fund? (1 = Yes, 2 = No, 3 = Blank)	___[12]	___[14]
Mark if dependent of another taxpayer	___[15]	___[16]
Taxpayer with income less than 1/2 support age 18 or 19 - 23 full-time student? (Y, N)	___[17]	
Mark if legally blind	___[20]	___[21]
Date of birth	___[22]	___[23]
Date of death	___[24]	___[25]
Work/daytime telephone number/ext number	___[26] ___[27]	___[28] ___[29]
Home/evening telephone number	___[30]	___[31]
Do you authorize us to discuss your return with the IRS? (Y, N)	___[32]	

Present Mailing Address

Address ___[36]
Apartment number ___[37]
City, state postal code, zip code ___[38] ___[39] ___[40]
Foreign country name ___[42]
In care of addressee ___[45]

Dependent Information

(*Please refer to Dependent Codes located at the bottom)

[46]

First Name	Last Name	Date of Birth	Social Security No.	Relationship	Months*** in home	Dep Codes *	**	Care expenses paid for dependent

Name of child who lived with you but is not your dependent ___[47]
Social security number of qualifying person ___[48]

Dependent Codes

***Basic**	**1 = Child who lived with you**	****Other**	**1 = Student (Age 19 - 23)**
	2 = Child who did not live with you		**2 = Disabled dependent**
	3 = Other dependent		**3 = Dependent who is both a student and disabled**
	4 = Claimed under pre-1985 agreement		
	5 = Qualifying child for Earned Income Credit only		
	6 = Children who lived with you, but do not qualify for Earned Income Credit		
	7 = Children who lived with you, but do not qualify for Child Tax Credit		
	8 = Children who lived with you, but do not qualify for Child Tax Credit or Earned Income Credit		
*****Months**	**77 = Reported on odd year return**		
	88 = Reported on even year return		
	99 = Not reported on return		