

Preparer use only

Business activity or profession name _____
 Taxpayer/Spouse (T, S) _____
 State postal code _____
 Contribute the maximum allowable contribution amount?(1 = Keogh, 2 = SEP, 3 = SIMPLE 401(k), 4 = Solo 401(k), 5 = SIMPLE IRA, 6 = SARSEP) _____
 Plan contribution rate. Enter in xx.xx format (Limitation percentage) _____
 Enter the total amount of contributions made to a Keogh plan in 2011 _____
 Enter the total amount of contributions made to a Solo 401(k) plan in 2011 _____
 Enter the total amount of contributions made to a SEP plan in 2011 _____
 Enter the total amount of contributions made to a SARSEP plan in 2011 _____
 Enter the total amount of contributions made to a defined benefit plan in 2011 _____
 Enter the total amount of contributions made to a profit-sharing plan in 2011 _____
 Enter the total amount of contributions made to a money purchase plan in 2011 _____
 Enter the total amount of contributions made to a SIMPLE 401(k) plan in 2011 _____
 Enter the total amount of contributions to a SIMPLE IRA plan in 2011 _____

Catch-up Contributions

Enter the amount of catch-up contributions made to a Solo 401(k) or SARSEP in 2011 _____
 Enter the amount of catch-up contributions made to a SIMPLE Plan in 2011 _____

Elective Deferrals

Enter the total contributions to a Solo 401(k) or SARSEP made through elective deferrals in 2011 _____
 Enter the amount of elective deferrals designated as Roth contributions in 2011 _____

NOTES/QUESTIONS:

Preparer use only

Principal business or profession
Taxpayer/Spouse/Joint (T, S, J)
State postal code

Business Use of Home

Table with 3 columns: Description, 2011 Information, Prior Year Information. Rows include Total area of home, Area used exclusively for business, Information for day-care facilities only, and Special computation for certain day-care facilities.

List as direct expenses any expenses which are attributable only to the business part of your home.
List as indirect expenses any expenses which are attributable to the overall upkeep and running of your home.

Table with 4 columns: Description, 2011 Information (Direct Expenses, Indirect Expenses), Prior Year Information. Rows include Mortgage interest, Mortgage insurance premiums, Real estate taxes, Excess mortgage interest and insurance premiums, Insurance, Rent, Repairs & maintenance, Utilities, Other expenses, Excess casualty losses, Carryovers, and Business expenses not from business use of home.

NOTES/QUESTIONS:

If you used your automobile for business purposes, please complete the following information.

Preparer use only

Description of business or profession _____

Vehicles 1 - 2

Vehicle 1 - Date placed in service _____
 Description _____
 Comments _____

Vehicle 2 - Date placed in service _____
 Description _____
 Comments _____

	Vehicle 1	Prior Year Information	Vehicle 2	Prior Year Information
Total miles for the year	_____	_____	_____	_____
Commuting miles	_____	_____	_____	_____
Business miles from 1/1/11 to 6/30/11	_____	_____	_____	_____
Business miles from 7/1/11 to 12/31/11	_____	_____	_____	_____
Vehicle use questions:				
Was the vehicle available for off-duty personal use? (Y, N)	___	___	___	___
Was another vehicle available for personal use? (Y, N)	___	___	___	___
Do you have evidence to support your deduction? (Y, N)	___	___	___	___
Is this evidence written? (Y, N)	___	___	___	___
Parking, fees and tolls	_____	_____	_____	_____
Gasoline, oil, repairs, insurance, etc.	_____	_____	_____	_____
Interest	_____	_____	_____	_____
Registration	_____	_____	_____	_____
Property taxes	_____	_____	_____	_____
Vehicle rentals	_____	_____	_____	_____
Inclusion amount (Preparer use only)	_____	_____	_____	_____
Depreciation	_____	_____	_____	_____

Vehicles 3 - 4

Vehicle 3 - Date placed in service _____
 Description _____
 Comments _____

Vehicle 4 - Date placed in service _____
 Description _____
 Comments _____

	Vehicle 3	Prior Year Information	Vehicle 4	Prior Year Information
Total miles for the year	_____	_____	_____	_____
Commuting miles	_____	_____	_____	_____
Business miles from 1/1/11 to 6/30/11	_____	_____	_____	_____
Business miles from 7/1/11 to 12/31/11	_____	_____	_____	_____
Vehicle use questions:				
Was the vehicle available for off-duty personal use? (Y, N)	___	___	___	___
Was another vehicle available for personal use? (Y, N)	___	___	___	___
Do you have evidence to support your deduction? (Y, N)	___	___	___	___
Is this evidence written? (Y, N)	___	___	___	___
Parking, fees and tolls	_____	_____	_____	_____
Gasoline, oil, repairs, insurance, etc.	_____	_____	_____	_____
Interest	_____	_____	_____	_____
Registration	_____	_____	_____	_____
Property taxes	_____	_____	_____	_____
Vehicle rentals	_____	_____	_____	_____
Inclusion amount (Preparer use only)	_____	_____	_____	_____
Depreciation	_____	_____	_____	_____

Depreciation - Asset Acquisitions

Preparer use only

Activity name _____

Use the comments section to provide additional information about the asset. Enter information such as vehicle mileage (total, commuting and business), the total and business square footage of home, home expenses (total and business portion). See the EXAMPLE asset below.

		Description of Asset Acquired	Date Acquired	Cost or Basis
	EXAMPLE	2011 Model T - (EXAMPLE ASSET)	03/09/11	25,750
		Comments: 22,500 job-related miles, 25,000 total miles		
1		Comments:		
2		Comments:		
3		Comments:		
4		Comments:		
5		Comments:		
6		Comments:		
7		Comments:		
8		Comments:		
9		Comments:		
10		Comments:		
11		Comments:		
12		Comments:		
13		Comments:		
14		Comments:		
15		Comments:		
16		Comments:		
17		Comments:		
18		Comments:		
19		Comments:		
20		Comments:		
21		Comments:		
22		Comments:		
23		Comments:		
24		Comments:		
25		Comments:		