

Willington Financial PC, CPAs
Seven Main Street
Stafford Springs, CT 06076-1453

The 2011 Tax Organizer may assist you in collecting and reporting information necessary for us to properly prepare your 2011 income tax return. The organizer is optional. If you feel a document gives all the necessary information (1099, etc.), feel free to just include it. Please do, however, try to answer the series of yes/no questions.

Please provide us with the following additional information:

- A copy of your 2010 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, 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
- Form(s) 1099-K (Merchant Card and Third Party Network Payments)
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

Thank you for your help.

Sincerely,

Mark Makuch, CPA

I (we) have submitted this information for the sole purpose of preparing my (our) tax return. Each item can be substantiated by receipts, cancelled checks, or other documents. This information is true, correct and complete to the best of my (our) knowledge.

If applicable, both taxpayer and spouse should sign.

Accepted by: _____
Taxpayer's signature Date

Spouse's signature Date