

# PARSONAGE VANDENACK WILLIAMS LLC

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## General Information Tax Worksheet

**Note:** Use this form to provide PVW with your general family information and financial information relative to the preparation of your annual individual income tax return. The preparation and submission to PVW of this form or any other tax worksheets available on PVW's website does not by itself create an attorney-client relationship. Please provide all of the following forms you receive for this tax year: W-2's, 1099's, K-1's, and 1098's. In addition, please complete and submit the other forms referenced below as relevant to your situation. We will also need copies of your 2010 and 2009 tax returns. If you have questions about what information is required or about this form, please call PVW at 402-504-1300 and ask to speak to one of our tax attorneys.

Name of Taxpayers	Social Security Number	Date of Birth	No. of Months Lived in Home

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Email: \_\_\_\_\_

School District: \_\_\_\_\_

### DEPENDENTS:

Name	Relationship	Social Security #	Date of Birth	No. of Months Lived in Home

Did you operate a trade or business in 2011?  Yes  No

If yes, please complete and submit the "Profit or Loss from Business" worksheet.

Did you operate a farm or crop share arrangement in 2011?  Yes  No

If yes, please complete and submit the "Farm or Crop Share Income and Expense" worksheet.

Did you lease any residential or commercial real estate in 2011?  Yes  No

If yes, please complete and submit the "Cash Rental Property Information" worksheet.

Were you the beneficiary of a trust and/or estate in 2011?  Yes  No

If yes, will you request that PVW prepare the entity return for 2011?  Yes  No

Did you have an own an interest in a closely held corporation, partnership or LLC in 2011?  Yes  No

If yes, will you request that PVW prepare the entity tax returns for 2011?  Yes  No

After this document has been completed, please email it to [info@pvwlaw.com](mailto:info@pvwlaw.com) or fax it to (402) 504-1935.

Did you have any employees during 2011?  Yes  No

If yes, will you request that PVW prepare year end payroll tax forms?  Yes  No

**If yes, please complete and submit the “Wages Paid to Employees” worksheet.**

Have you itemized deductions in prior years?  Yes  No

**If yes, please complete and submit the “Itemized Deductions” worksheet.**

Did you buy or sell any stock or bonds during 2011?  Yes  No

Did you receive interest or dividend income during 2011?  Yes  No

**If yes, please complete and submit the “Interest Income” or “Dividend Income” worksheets as applicable.**

Did you incur employee business expenses during 2011?  Yes  No

Did you incur child and dependent care expenses in 2011?  Yes  No

**If you paid another person or partnership (not a corporation) \$600 or more during the calendar year or interest payments of \$10 or more, you must file information forms (Forms 1099 and 1096) to report these payments to IRS. Such payments include interest or dividends (\$10 or more), rents, commissions, fees, labor, machine work, etc. (of \$600 or more). These forms are required to be completed and mailed to the persons you paid by January 31. The 1096 transmittal form must be signed by you and mailed to the IRS by the end of February.**

Will you request that PVW prepare year end payroll tax forms?  Yes  No

**If yes, please complete and submit the “Information Forms – Form 1099” worksheet.**

**Have you received any letters or notices from the IRS during 2011?**  Yes  No

If yes, please provide copies of such letters or notices along with any responses or replies sent by you or someone on your behalf.

