

TaxWorks Conversions 2010

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Welcome to TaxWorks 2010

Thank you for choosing TaxWorks Professional Tax Software. We are excited to have you on our team and we are look forward to building a lasting relationship together.

As you make the transition to TaxWorks we want to ensure that everything runs as smoothly as possible. The first step of this transition will be converting your clients from your 2010 software package. This document contains step-by-step instructions on converting your clients. Please read through it carefully.

Information is documented for the 1040 system. Not all forms or fields do convert. The form information is lengthy and is intended for reference purposes only. You needn't read it in its entirety.

If you require assistance during the conversion process, [click here to view our Conversion Video](#) or, don't hesitate to contact our support team at 1-800-843-1139. Again, welcome! We look forward to working with you.

Sincerely,

TaxWorks Professional Tax Software

Disclaimer Statement

The goals of the TaxWorks data conversion are as follows:

1. To convert only the data from your software package to TaxWorks that you will need to update Clients, which transfers your 2010 TaxWorks data to 2011 TaxWorks.
2. To convert only the 2010 data to 2010 TaxWorks format that will allow you to generate complete and accurate Tax Organizers.

The data conversion is NOT intended to do the following:

1. It is NOT intended to convert all of your data.
2. It is NOT intended to allow you to generate a complete and accurate 2010 TaxWorks tax return.

NOTE: Do not process/prepare 2010 tax returns using only the converted information, as tax calculations may not be accurate. Some manual data entry may be required.

Depreciation Conversions

- ✍ We recommend you print a copy of the TaxWorks Federal Depreciation Schedule and verify that the TaxWorks current depreciation amounts match those calculated by your prior software. Due to the many ways depreciation can be calculated, there may be slight differences that could require manual overrides in the TaxWorks Asset Manager.
- ✍ There must be a description entered in the Automobile Information and Depreciation worksheet. If not, the mileage will not convert.
- ✍ Verify the Method accurately converted.
- ✍ Verify the Convention accurately converted. Any default Conventions will convert.
- ✍ If you have overridden any depreciation calculations, review them for accuracy.
- ✍ If you had selected to delete the asset next year, the asset will not convert.
- ✍ Assets involved in a like-kind exchange may not convert properly, because of the difference in handling between the two systems. Review them carefully to make sure the correct information is entered into the TaxWorks Asset Manager.
- ✍ Due to the limited amount of information being converted, if you have current year Section 179, the conversion may calculate a carryforward of these amounts. To remove the unused carryforward, open the TaxWorks 2010 Asset Manager, click the 179 button, and remove any unnecessary information.

- ✎ Review automobile mileage conversions when depreciable basis information is not present to ensure that mileage information transfers to the appropriate form and line.
- ✎ Functional categories, location, account code, and division information may not convert or may partially convert. Review any converted information for accuracy.
- ✎ Review the “Method Selected” for vehicle expense deduction computation in the lower right corner of the vehicle tab. TaxWorks does not optimize between standard mileage and actual expenses in years other than the first year the vehicle was placed into service. Adjust this field to reflect the proper deduction approach.

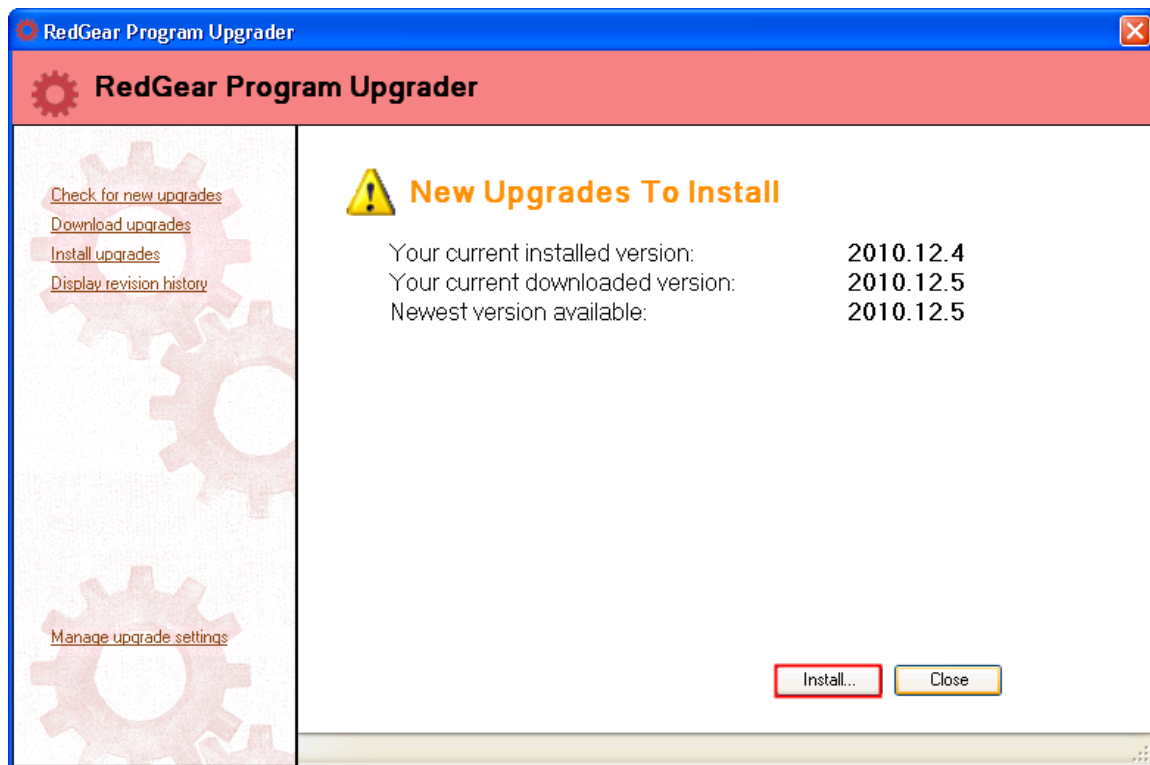
Individual Conversions

Note: *TaxWorks only converts information necessary to prepare a Proforma and Taxpayer Organizer.*

- ✎ Preparer information will not convert.
- ✎ Calculated amounts will not convert.
- ✎ Schedule A, Line 5 will require verification because not all state information is converted.
- ✎ Schedule B amounts will require verification if nominee distributions or K-1s are present in return.
- ✎ It may be necessary to manually remove some items after updating to TaxWorks 2010 because some items selected for deletion for the next year may not be taken into account.
- ✎ Detail Statements – All amounts and descriptions may not convert.
- ✎ 1099 R – Rollover Distribution will not be converted.
- ✎ Form 1116 will need to be reviewed for accuracy due to differences in software formatting.
- ✎ TaxWorks 2011 Taxpayer Organizer is available.

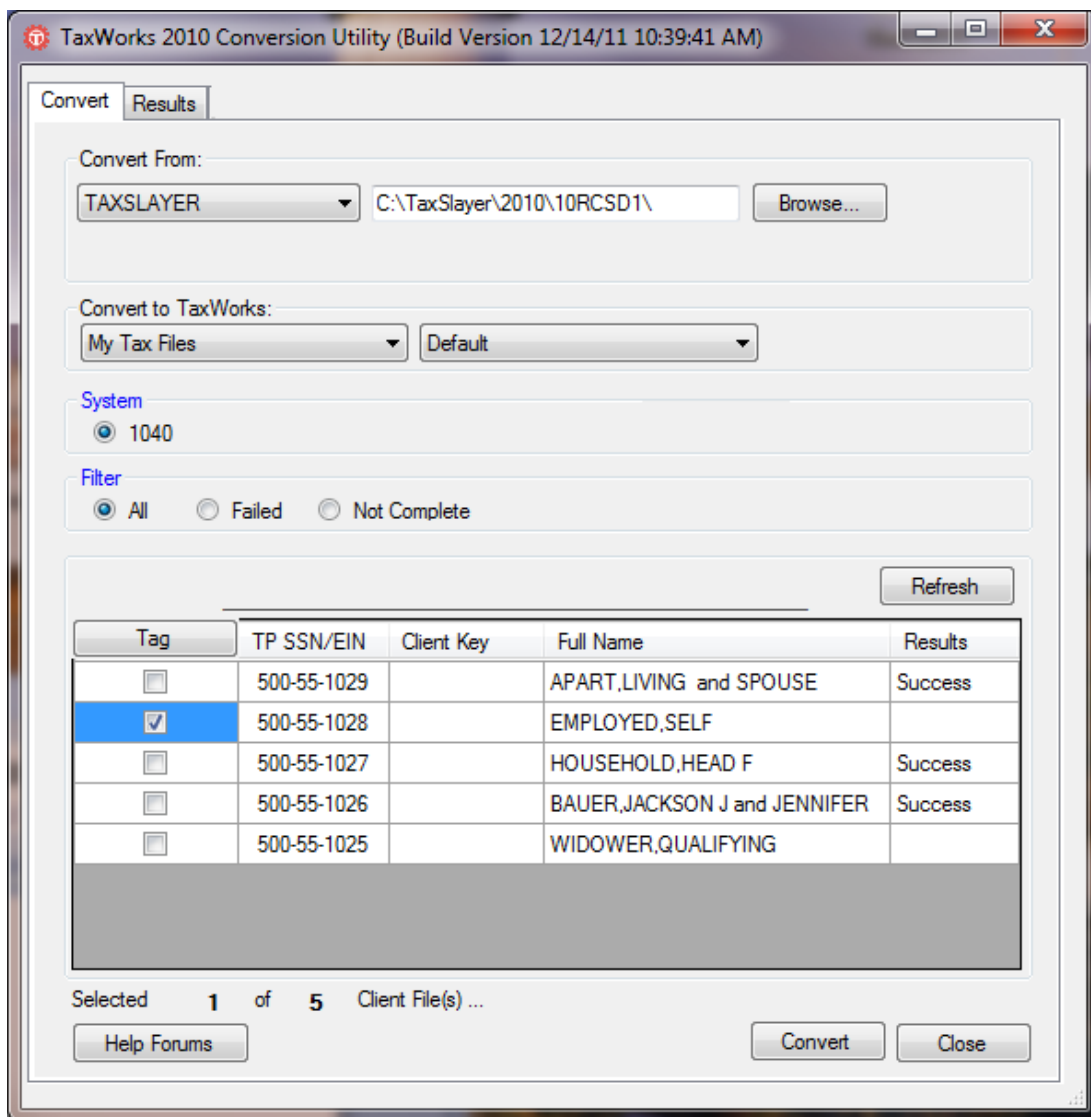
Conversion Process

1. As a precaution, backup your client data in your 2010 software package.
2. A working copy of the TaxWorks program is required to convert your files into. If you do not have a copy of 2010 Demo, contact our Sales Team at 1-800-230-2322 before beginning this process.
3. Follow the installation instructions provided with the demo.
4. TaxWorks comes with an automatic Upgrader Utility. Click on the icon at the bottom of your screen to display this utility.
5. Note: TaxWorks must be closed in order to upgrade to the latest version available
6. Click *“Install”*.



7. Verify that the most current version of the TaxWorks is installed
8. With the most current version of the program installed click *“File”* on the menu bar and select *“Convert clients”* on the dropdown menu
9. The TaxWorks Conversion License Agreement will appear.
 - a. Read this license completely.
 - b. If you agree, click *“I Accept”*.

10. TaxWorks will close and the “TaxWorks 2010 Conversion Utility” will open.
 - a. At the top of this window click the down arrow to select the tax software vendor you will be converting from.
 - b. Verify the Data Path of your clients.
11. Select the TaxWorks Data Path (default is MY TAX FILES).
12. Select the TaxWorks Folder (default is DEFAULT).
13. Select the system (1040) to convert.
 - a. The clients will appear for the system selected.
 - b. Tag clients you want to convert. To Tag all clients click “Tag”.
14. Click *Convert*.



15. Once the conversion is complete, the status of each client will be displayed in the Results column.

16. To insure your client data updates and converts correctly you will need to “Batch Process” the newly converted returns within the TaxWorks 2010 program. A reminder box will appear to remind you of this process. After reading this reminder click “Close”.
17. To view a conversion report, click the “Results” tab.
18. When finished click *Close*.
19. Start TaxWorks 2010
 - a. Note: If the Client Selection window does not open automatically click the *Clients* button located on the button bar.
20. The newly converted clients will appear in the Client Selection Screen.
21. To Batch Process clients:
 - a. Tag the clients to Batch Process.
 - b. Click the “Utilities” button at the top of the menu bar.
 - c. Click “Process (Only)” in the dropdown.
 - d. Click “Process”.
 - e. A detailed note screen will appear showing the status of your clients during this batch processing.
 - f. When finished click “Close”.
22. Re-open the “Client Selection” screen.
23. Carefully review your converted data files to be sure your converted data is accurate. To open the return double click on the desired client file; or, highlight the desired client and click *Open*. If you have items that did not convert, manually enter them in the TaxWorks program.
24. To Proforma your data to the 2011 software
 - a. Start TaxWorks 2011 and make sure you are in the Client Selection window
 - b. Select the Data Path Name and Folder that you wish your Proforma clients to be stored.
 - c. Click the Proforma button and read the important note that is displayed and Click OK to display the Proforma utility.
 - d. Tag the clients to Proforma and click the Proforma button
 - e. A “Proforma Process” window will open and display the Proforma progress.
 - f. When complete click OK and Close to close the “Proforma Process” window
 - g. Close the Proforma utility
25. Carefully review your Proforma returns in TaxWorks2011 to be sure the data is accurate.

Additional Notes:

If you have any questions or suggestions concerning the conversion process please contact us at support@TaxWorks.com or call 1-800-843-1139.

Occasionally we will upgrade items in the conversion program. We will post upgrade changes to the [conversions forum web site](#). You may reconvert clients affected by these changes.

CAUTION: *Entries made in TaxWorks to previously converted clients will be lost.*

TaxSlayer® to TaxWorks® 2010

Individual (1040) Conversion Items

The **bold titles** are the titles that correspond with the Forms Pane of the TaxWorks tax program. The **underlined and bold** titles are the sub-titles within each input screen.

GI – General Info – Advanced

General Information

Taxpayer First Name and Initial
Taxpayer Last Name
Title
Taxpayer SSN
Taxpayer Occupation
Taxpayer Birthdate
Taxpayer Blind
Taxpayer Death Date
Taxpayer Home Phone
Taxpayer Work Phone
Taxpayer Cell Phone
Spouse First Name and Initial
Spouse Last Name
Spouse Occupation
Spouse Birthdate
Spouse Blind
Spouse Death Date

Address, County and School

Address
Zip, City, State

Taxpayer E-mail Address

Foreign Address (If Required)

Foreign street address
City
State or Province
Postal Code
Country

Filing Status

Single

Taxpayer Can Be Claimed On Someone
Else's Return

Joint

Check if Spouse Is Claimed On Someone
Else's Return

Married Filing Separate

Head of Household

Qualifying Widow(er)

DI – Dependents

Dependent Information

First Name
Last Name
Birthdate
SSN
Relationship

Months in Home
Disabled
Student
Child Care Exp

1 – 1040 Pg 1

Form 1040 – U.S. Ind Income Tax Return, Pg 1

Income

Tax-exempt Interest – TP
Tax-exempt Interest – SP
Qualified Dividends
Taxable Refunds, Credits, or Offsets
Alimony Received – TP
Alimony Received – SP
Other Income
NOL Carryforward from 2009

Educator Expenses – TP
Self-employed SEP, SIMPLE – TP
SE Health Ins Dedn from Sole Proprietor - TP
Alimony Paid -
Recipient's SSN
Recipient's Amount
Domestic Production Activities Deduction
Other Adjustments

Adjustments

2 – 1040 PG 2

Form 1040 – U.S. Ind Income Tax Return, Pg 2

Third Party Designee

Preparer Is Third Party Designee
Name

Phone Number
Personal ID Number

W2 – Wage W2

Form W-2 – Wages and Tax information

Employee SSN (if different)
Employee Name (if different)
Employee Address (if different)
Employee City, State, ZIP (if different)
Employer's ID Number
Employer's Name
Employer's Address
Employer's ZIP, City, State
Control Number
Wages, Tips, Other Compensation
Federal Income Tax Withheld
Social Security Wages
Social Security Tax Withheld
Medicare Wages and Tips
Medicare Tax Withheld
Social Security Tips
Allocated Tips

Advanced EIC Payment
Dependent Care Benefits
Nonqualified Plans
Box 12
Retirement Plan
Third-Party Sick Pay
Non-standard Indicator
Corrected Form W-2
Box 14
State Name
State ID Number
State Wages
State Tax Withheld
Local Wages
Local Tax
Locality Name

W2G – Gambling W2

W-2G – Certain Gambling Winnings

Winner's Name (if different)
Winner's Street Address (if different)
Winner's City, State, Zip (if different)
Payer's Federal ID Number
Payer's Name
Payer's Address
Payer's Zip, City, State
Gross Winnings
Federal Income Tax Withheld
Date Won
Transaction

Race
Winnings from Identical Wagers
Cashier
Window
First ID Number
Second ID Number
Two-letter State Code
Payer's State ID Number
State Tax Withheld
Non-Standard Indicator

1099G – Govt Payments

Form 1099-G – Government Payments

Recipient's Name (if different)
Recipient's Street Address (if different)
Recipient's City, State, ZIP (if different)
Federal ID Number
Payer's Name
Payer's Address
Payer's ZIP, City, State

Payer's Telephone Number
Account Number
Unemployment Compensation
Federal Income Tax Withheld
State Tax Withheld
State
Payer State No

1099R – Pensions

Form 1099R – Distributions from Pensions, Etc

Payee's Name (if different)
Payee's Street Address (if different)
Payee's ZIP, City, State (if different)
Federal ID Number
Payer's Name
Payer's Address
Payer's ZIP, City, State
Account Number
Gross Distribution
Taxable Amount
Taxable Amount Not Determined
Total Distribution
Capital Gains Included in Line 2a
Federal Income Tax Withheld
Employee Contributions
Net Unrealized Appreciation
Distribution Code
IRA/ SEP/ SIMPLE
Partial Rollover Amount Included

Percent
Percent Total Distribution
Total Employee Contribution
1st State
State
State Tax Withheld
Payer State Number
State Distribution
Local Tax Withheld
Locality Name
Local Distribution
2nd State
State
State Tax Withheld
Payer State Number
State Distribution
Local Tax Withheld
Locality Name
Local Distribution

SSA – Soc Sec Ben

Social Security and Tier 1 Railroad Benefits

Taxpayer –

Total Social Security Benefits
Total Medicare Premiums Paid
Federal Income Tax Withheld

Spouse –

Total Social Security Benefits
Total Medicare Premiums Paid
Federal Income Tax Withheld

A – Schedule A

Sch A – Itemized Deductions

Medical and Dental Expenses

Medicine and Drugs
Medical Insurance
Medical Miles
Override Total Long-term Care Premiums
Other Medical Expenses
Description
Amount

Street Address
ZIP Code (C/S/Z)
SSN
Federal ID Number
Amount
Points Not Reported on 1098
Mortgage Insurance Premiums
Investment Interest

Taxes Paid

State and Local Income Taxes
General Sales Taxes
Real Estate Taxes:
State and Local
Other Taxes:
Personal Property Taxes
Other Taxes
Description
Amount

Gifts to Charity

Contributions by Cash or Check
Description
Amount
Total Charitable Mileage at .14
Contributions Other than Cash or Check
Amount

Interest Paid

Home Mortgage Interest Reported on 1098
Mortgage Interest Not Reported on 1098
Name

Job Expenses and Most Other Misc Items

Unreimbursed Employee Expenses:
Union and Professional Dues
Other Un-reimbursed Expenses
Tax Return Preparation Fees
Other Limited Expenses:

Other Miscellaneous Deductions

Gambling Losses
Other Miscellaneous Deductions

B – Schedule B

Sch B – Interest and Ordinary Dividends

Part I – Interest Income

Interest Income Advanced

Interest Income Description
T,S,J
Interest Income (Not US Govt)
Early Withdrawal
US Govt Savings Bonds
Tax-Exempt (Muni Bonds)
Issuing State
Federal Withholding

Interest Inc from Seller-Financed Mortgages

Name
Street Address
SSN
Federal ID Number
T,S,J
Amount

Part II – Ordinary Dividends

Dividend Income Advanced

Dividend Income Description
T,S,J
Total Ordinary Dividends
Qualified Dividends
Total Capital Gains
(28%) Collectibles
Unrecap Sec 1250
Sec 1202 Gain
Adjustment Type
Adjustment Amount
Foreign Taxes Paid
Federal Withholding

C – Schedule C

Schedule C – Profit or Loss From Business

Principal Business Including Product Principal
Principal Business Code
Business Name
Employer Identification Number
Street address (if different)
City, State, ZIP (if different)
Accounting Method –
(Cash, Accrual, Other, Specify)
Taxpayer Materially Participates
First Schedule C Filed for this Business

Part I – Income

Gross Receipts or Sales
Statutory Employee
Returns and Allowances
Cost of Goods Sold (From Part III)
Other Income

Part II – Expenses

Advertising
Commissions
Contract Labor
Depletion
Depreciation
Employee Benefit Program
Insurance
Interest:

Mortgage (Paid to Banks)
Other Interest
Legal / Professional Services
Office Expense
Pension / Profit Sharing
Rent or Lease:
Vehicles, Machinery, Equip
Other Business Property
Repairs / Maintenance
Supplies
Taxes and Licenses
Travel, Meals and Entertainment
Travel
Meals and Entertainment:
(Limited 50%)
(100% Deductible)
(Subj to D.O.T. hrs/svc Limits)
Utilities
Wages

Part III – Cost of Goods Sold

Methods Used to Value Closing Inventory
(Default = Cost)
Lower of Cost or Market,
Other
Was There a Change in Determining Quantities
Beginning Inventory

Purchases
Cost of Labor (Not Paid to Self)
Materials and Supplies
Other Costs
Inventory at End of Year

Part V – Other Expenses

Other Expenses

D – Schedule D

Schedule D – Capital Gains and Losses

1099 Transactions Prop Desc
Acquired Date
Sold Date
Sales Price
Cost or Basis
Gain or Loss

Part II – Long Term Capital Gains and Losses

Regular Tax – Capital Gain Distrib
Reg Tax 28% Rate – Capital Gain Distrib

E – Sch E Pg 1

Schedule E – Rental Real Estate / Royalties, Pg1

Property Kind
Location: Street Address
Zip, City, State
Percent of Ownership (If Not 100%)
Personal Use for More Than 14 Days

Income:

Rents Received
Royalties Received

Expenses – Direct:

Advertising
Other Travel Expense

Cleaning and Maintenance
Commissions
Insurance
Legal and Other Professional Fees
Management Fees
Mortgage Interest Paid to Banks Etc
Other Interest
Repairs
Supplies
Taxes
Utilities
Other Expenses

ES – Estimates

1040 Estimated Tax

2010 Estimated Tax Payments

Prior year Overpayment Applied
1st Payment – Date
2nd Payment – Date
3rd Payment – Date
4th Payment – Date

1st Payment – Amount
2nd Payment – Amount
3rd Payment – Amount
4th Payment – Amount
Amount Paid with 2010 Extension

F – Schedule F

Schedule F – Farm Income and Expense

Principal Product
Agricultural Activity Code
Employer ID Number
Taxpayer Materially Participates - No

Part I – Farm Income – Cash Method

Sale – Livestock or Other Items Bought for
Resale

Cost – Livestock, Otr Items Reported on Ln 1
Sale of Livestock and Other Products Raised
Total Cooperative Distributions Amount
Taxable Amount
Agricultural Program Payments
Taxable Amount
Commodity Credit Corporation (CCC) Loans:
CCC Loans Reported Under Election

CCC Loans Forfeited
 Taxable Amount
 Crop Insurance Proceeds and Payments:
 Amount Received in 2010
 Taxable Amount
 Elect to Defer to 2011
 Amount deferred from 2009
 Custom Hire (Machine Work) Income
 Other Income

Part II – Farm Expense – Cash Method and Accrual Method

Car/Truck Expenses
 Chemicals
 Conservation Expense
 Custom Hire
 Depreciation
 Employee Benefit Programs
 Feed Purchase
 Fertilizers and Lime
 Freight and Trucking
 Gasoline Fuel and Oil
 Insurance (Not Health)
 Interest:
 Mortgage Pd to Banks, Etc
 Other
 Labor Hired Less Emp Credits
 Pension and Profit Share

PTK1 – PT K1 Recd

Partnership Schedule K-1 Received

Entity Ownership (T,S,J)
 Partnership Identification Number
 Partnership Name
 Partnership Street Address
 Partnership Zip Code (C/S/Z)
 Publicly Traded Partnership
 Foreign Partnership
 Final Disposition
 Some Is Not At Risk

Income or Loss

Ordinary Income from Trade or Business
 Net Income from Rental Real Estate Activities
 Net Income from Other Rental Activities
 Interest Income
 Ordinary Dividends
 Qualified Dividends
 Royalty Income
 Net Short-term Capital Gain (Loss)
 Net Long-term Capital Gain (Loss)
 Collectibles (28% Rate) Gain (Loss)
 Unrecaptured Section 1250 Gain
 Net Section 1231 Gain (Loss):

Rent or Lease:
 Machinery and Equipment
 Other (Land, Animals)
 Repairs and Maintenance
 Seeds and Plants
 Storage / Warehousing
 Supplies Purchased
 Taxes
 Utilities
 Vet, Breeding, Medicine
 Other Expenses

Part III – Farm Income – Accrual Method

Sale of Livestock, Produce, Grains, Etc
 Total Coop Distributions (1099-PATR)
 Taxable Amount
 Agricultural Program Payments
 Taxable Amount
 Commodity Credit Corporation (CCC) Loans:
 CCC Loans Reported Under Election
 CCC Loans Forfeited
 Taxable Amount
 Crop Insurance Proceeds
 Custom Hire (Machine Work) Income
 Other Income Including Fuel Tax Credit
 Inventory – Livestock, etc at Beginning of Year
 Cost of Livestock, Produce, etc During Year
 Inventory of Livestock, etc at End of Year

From Other Rental Activities
 Other Income or (Loss)

Section 179 Expense

Section 179 Expense Deduction

Other Deductions

Self-Employment Earnings (Loss)

Net Earnings from Self-employment – Nonfarm
 Gross Farming or Fishing Income
 Gross Nonfarm Income

Credit and Credit Recapture

Alternative Minimum Tax (AMT) Items

Tax – Exempt Income and Nondeductible Exp

Distributions

Distributions of Money
 Distributions Subject to Section 737
 Distributions of Property Other Than Money

Other Information

CSK1 – CS K1 Recd

S Corporation Schedule K-1 Received

Entity Ownership (T,S,J)
S Corporation Identification Number
S Corporation Name
S Corporation Street Address
S Corporation ZIP Code (C/S/Z)
Final Disposition or Exempt from Limitation
Some is Not At Risk

Unrecaptured Section 1250 Gain
Net Section 1231 Gain (Loss)
From Other Rental Activities
Other Income

Section 179 Deduction

Section 179 Expense Deduction

Income or Loss

Ordinary Business Income (Loss)
Net Rental Real Estate Income (Loss)
Other Net Rental Income or (Loss)
Interest Income
Ordinary Dividends
Qualified Dividends
Royalties
Net Short-term Capital Gain (Loss)
Net Long-term Capital Gain (Loss)
Collectibles (28% Rate) Gain or (Loss)

Other Deductions

Credits and Credit Recapture

Foreign Transactions

Total Foreign Taxes Paid

Alternative Minimum Tax (AMT) Items

Items Affecting Shareholder Basis

Other Information

FDK1 – FD K1 Recd

Fiduciary Schedule K-1 Received

Beneficiary Ownership Code
Estate or Trusts Identification Number
Fiduciary Name
Fiduciary Street Address
Fiduciary ZIP Code (C/S/Z)

Unrecaptured Section 1250 Gain
Other Portfolio Income
Ordinary Business Income
Net Rental Real Estate Income
Other Rental Income
Directly Apportioned Deductions
Estate Tax Deduction
Final Year Deductions
Alternative Minimum Tax Items
Credits and Credit Recapture
Other Information

Description / Distributive Share Items

Interest Income
Ordinary Dividends
Net Short-term Capital Gain (Loss)
Net Long-term Capital Gain (Loss)
(28% Rate) Gain (Loss)

1116 – Form 1116

Form 1116 – Foreign Tax Credit

Type of Income
Resident of (Name of Country)

Itemized or Standard Deduction
Other Deductions
Gross Foreign Source Income
Gross Income from All Sources
Home Mortgage Interest
Other Interest Expense
Losses from Foreign Sources

Part I – Taxable Income from Foreign Sources

Name of Foreign Country or US Possession
Gross Income from Sources within Country
Gross AMT Income from Sources Within
Expenses Definitely Related to Ln 1a Income
Pro Rata Share of Other Deductions:

2106 – Form 2106

Form 2106/2106 EZ – Emp Business Expense

Part I – Employee Business Expenses

Occupation

Step 1 – Expenses

Parking Fees, Tolls, Trans, Incl Trains, Etc
Travel Expense Away from Home – Other
Business Exp Not Included Above (Not M & E)
Meals & Entertainment Expenses

Step 2 – Reimbursements from Employer for Expenses in Step I

Column A – Not Meals and Entertainment
Not Reported in Box 1 of Form W-2
Column B – Meals and Entertainment
Not Reported in Box 1 of Form W-2

Date Placed in Service
Total Miles Driven
Business Miles
Avg Round Trip Commute
Commuting Miles Incl in Total
Gasoline
Rental or Lease
Inclusion Amt
Value of Emp-Prov Vehicle
Vehicle Available for Personal off Duty Use
Is Another Vehicle Available for Personal Use
Evidence to Support Deduction
If Yes, Is Evidence Written

Part II Vehicle Expenses

2441 – Form 2441

Form 2441 – Child Care Credit

Part I – Persons Who Provided the Care

Name
Street Address
City State and ZIP Code
Phone Number

SSN
EIN
Amount Paid

2555 – Form 2555

Form 2555 – Foreign Earned Income

Foreign Address
Foreign City
Foreign State or Province
Foreign Postal Code
Foreign Country Code
Name of Employer
Employer Address – U S Address
Employer Address – ZIP, City, State
Employer Address – Foreign Address
Employer Address – Foreign City
Employer Address – City
Employer Address – State or Province
Employer Address – Postal Code
Employer Address – Country
Employer Is:
A Foreign Entity
A U S Company
Self
A Foreign Affiliate of U S Company
Other
Other – Specify
Last Year (After 1981) Form 2555 Was Filed
Type of Exclusion for Which It Was Effective
Citizen of Which Country
Maintained Separate Home for Family

Number of Days Home Was Maintained
Tax Home Located During the Year
Date Home Was Established

Part II – Taxpayers Qualifying Under Bona Fide Residence Test

Date Bona Fide Residence Began
Date Bona Fide Residence Ended
Kind of Living Quarters
If Family Member Lived Abroad With TP–
Relationship
For What Period?
Statement Submitted to Foreign Country That
Taxpayer Is Not a Resident of That Country
Taxpayer to Pay Income Tax to Foreign Cntry
If Present in U S on Business during Tax Year:
Date Entered US
Date Left US
Days in US
Income Earned
List Any Contractual Terms
Type of Visa
Did Visa Limit Stay In Foreign Country
Address of US Home While Living Abroad
Was US Home Rented

Name of Occupants
Relationship

Part III – Taxpayers Physical Presence Test

Physical Presence Test – From
Physical Presence Test – Through
Principal Country of Employment
Information Concerning Travel Abroad:
Name of Country
Date Arrived
Date Left
Days in Country
Business Days in US
Income Earned

Part IV – All Taxpayers

Total Wages, Salaries, Bonuses, Commissions
Allowable Share of Inc for Srvcs Performed –
In a Business
In a Partnership
Noncash Income:
Home
Meals
Car

6252 – Form 6252

Form 6252 – Installment Sale Income

Description
Ownership (T,S,J)
Date Acquired
Date Sold
Property Was Sold After May 14, 1980
Property Sold Was a Marketable Security

Part I – Gross Profit and Contract Price

Selling Price
Mortgage Purchaser Assumes
Cost or Other Basis of Property Sold
Commissions and Other Expenses
Income Recapture from Form 4797, Ln 31
If Main Home, Amount of Excluded Gain

Part II – Installment Sale Income

Gross Profit Ratio – Federal
Total Payments Received During Year
Payments Received in Prior Years
Portion Taxable as Ordinary Income

8379 – Form 8379

Form 8379 – Injured Spouse Claim / Allocation

Injured Spouse is Taxpayer
Injured Spouse is Spouse
Want Refund Issued in This Name Only
If Different – Street Address

Other Properties or Facilities
Allowances / Reimbursements:
Cost of Living and Overseas Differential
Family
Education
Home Leave
Quarters
Any Other Purpose
Other Foreign Earned Income Amount
Other Foreign Earned Income – Specify
Total Excludable Meals and Lodging

Part VI – Claiming Housing Exclusion AND

Part VII – Claiming Foreign Earned Inc Excl

Qualified Housing Expenses for the Tax Year
Employer Provided Amounts
Number of Days Within 2010 Tax Year

Part VIII – Claiming Housing Excl

Deductions Allowed Allocable to Excluded Inc

Part IX – Claiming Housing Deduction

Housing Deduction Carryover from 2009

Part III – Related Party Installment Sale Income

Related Party Name
Social Security Number
Federal EIN
Street Address
ZIP Code (C/S/Z)
Did Related Party Resell Property during Tax Yr
Second Disposition More Than 2 Years after First
Date of Disposition
First Disp Was Sale of Stock to Issuing Corp
Second Disp Was Involuntary Conversion
Second Disp Occurred After Death
Tax Avoidance Not Principal Purpose
Tax Avoidance Explanation
Selling Price of Property Sold by Related Party
Contract Price from Line 18
Portion of Ln 35 That Is Ordinary Income

Part II – Items Allocated to Injured Spouse

Wages
Other Income
Adjustments to Income
Standard or Itemized Deductions

Number of Exemptions
Credits
Other Taxes
Federal Income Tax Withheld
Payments

8615 – Form 8615

Form 8615 – Tax for Certain Children

Child’s Earned Income
Parent’s Name
Parent’s Social Security Number
Parent’s Filing Status Code
Parent’s Taxable Income
Total Net Investment Income
Child’s Itemized Deductions

Amount from Parents’ Schedule D
If Sch D Filed, Lesser of Sch D, Line 15
Line 18 (28% Rate)
Line 19 (Unrecaptured Sec 1250)
Form 4952, Line 4g
Parent’s Tax

8829 – Form 8829

Form 8829 – Business Use of Home

Part I – Part of your home used for business

Area Used Exclusively for Business
Total Area of Home
Total Hours Facility Used (Daycare)
Total Hours Available

Indirect Expenses

Casualty Losses
Deductible Mortgage Interest
Real Estate Taxes
Excess Mortgage Interest
Insurance
Rent
Repairs and Maintenance
Utilities
Other Expenses
Carryover of Operating Expenses
Excess Casualty Losses
Carryover of Excess Casualty Losses

Part II – Allowable Deductions

Sch C / K-1 Only:

Net Gain Derived from Busn Use of Home

Direct Expenses

Casualty Losses
Deductible Mortgage Interest
Real Estate Taxes
Excess Mortgage Interest
Insurance
Rent
Repairs and Maintenance
Utilities
Other Expenses

Part III – Depreciation of Home

Smaller of Home’s Adjusted Basis
Value of Land Included on Line 36
Depreciation Allowable

8839 – Form 8839

Form 8839 – Qualified Adoption Expenses

Child’s Name – First/Last
Year of Birth
Born Before 1993 and Disabled
Special Needs Child
Foreign Child
Social Security Number
Qualifying Expenses

2006 Credit Carryforward
2007 Credit Carryforward
2008 Credit Carryforward
2009 Credit Carryforward

Part III – Employer-Provided Adoption Benefits

Child #1
Prior Year Employer-Provided Benefits
Total Emp-Provided Adoption Benefits2010
Child #2

Part II – Adoption Credit

2005 Credit Carryforward

Prior Year Employer-Provided Benefits

Total Emp-Provided Adoption Benefits 2010

8853 – Form 8853

Form 8853 – Archer MSAs Insurance Contracts

Section C – Long-term Care (LTC) Ins Contracts

Spouse is Policyholder
Name of Insured – First Name
Name of Insured – Last Name
Social Security Number of Insured
In 2010, Did Anyone Other Than TP Rcv Pymts
Was Insured Terminally Ill

Gross LTC Payments Received
Part of Line 17 from Qualified LTC Contracts
Accelerated Death Benefits Received
Costs Incurred for Qual LTC Services
Total Reimbursements Received

Assets – Asset Manager

General Tab

Form Type
Description
Type
Date
Fed – Cost
Fed – Current Sec 179
Fed – Prior Sec 179
Fed – Basis
Fed – Method
Fed – Period
Fed – Convention
Fed – Current Deprec
Fed – Prior Deprec
Fed – Override Current

Fed – Business Use Percent
Section 179 Property

Vehicle Tab

Business Mileage
Commuting Mileage
Other Mileage
Total Mileage

Disposition Tab

Date of Disposition
Gross Sales Price