

YOUR NAME _____

ORGANIZER 2011 – A FEW MORE QUESTIONS PLEASE

- YES NO Do you have and use e-mail? If so, please provide us with your CURRENT e-mail address

- YES NO Do we have permission to send information to your e-mail address?
- YES NO Do you own more than one home that is NOT a rental property?
- YES NO If yes above, do the mortgage principals exceed \$1M? Please help us by indicating which mortgage statements belong to which house, including any rentals.
- YES NO Has your dependent college student child already filed his/her tax return?
If so, please let us know if that child claimed an exemption for him/herself.
- YES NO Did you contribute more than \$500 of noncash charity? If so, please provide for us the amount you paid originally for those items.
- YES NO Did you exercise stock options in 2011? Circle: nonqualifieds incentive stock options
- YES NO If you exercised stock options, did you sell the stock? If so, please provide us with brokerage statements showing the sale and any information your company provided to you regarding the exercise.
- YES NO Did you read the Taxpayer Letter included in this package? If not, please do so – there is a lot of important information included.
- YES NO Have you ever used the www.zaffore.com web site? If so, tell us why in a few words below. And if not, tell us why in a few words. This will help us improve the site for you.

Do you use **Facebook**? You don't need to tell us ☺. But if you do, please consider visiting our fan page on Facebook at Kathleen M Zaffore PC and clicking on "like." Kathy does not "friend" our clients – because she NEVER looks at her Facebook wall. But she does check the fan page almost every day to post interesting tid bits for our clients and friends.

If any of your CONTACT INFORMATION has changed, please note here:

If you have any other issues you think we should be aware of, please jot them here or on the back.

Thank you!!