

AMR Tax Services, Inc.

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December 31, 2011

Dear Friends,

Thank you all so much for a successful tax season last year. Each year brings new growth and possibilities. This is another exciting year and we look forward to seeing you.

This past year has brought many changes to personal income taxes. We have different deductions that are available, new and extended credits, along with adjusted income levels for Earned Income Credit and Child Tax Credits. Please take the time to fill out a worksheet even if you have not in the past.

We have online booking available through our website. For those we served last year, you are already registered. You can log in using your last name as the user name and your house number as the password. When you book online you will receive a confirmation e-mail and a reminder the day before your appointment. Please refer your friends to our web site.

Before coming in for your appointment, please take the time to review your last years' return to verify the social security numbers of all persons listed. The IRS checks all the numbers and if one is wrong it will cause a delay in the processing of your return. The IRS is requiring all tax preparers who prepare more than 10 returns to E File ALL returns prepared. AMR falls under this rule.

AMR Tax Services, Inc. is an Authorized E File Provider. We offer the full range of E-File options. Please be sure to verify the names and social security numbers on your return. The IRS verifies all these on electronically filed returns. If these items are wrong, there could be a delay in the amount of time it takes you to receive your refund. **EARNED INCOME CREDIT RECIPIENTS SHOULD BE AWARE THE IRS IS EXPANDING THE EIC VERIFICATION CHECKS. THIS COULD RESULT IN A DELAY IN THE REFUND FOR EARNED INCOME CREDIT.** Keep in mind you may file electronically even if you owe money. This way you have verification the IRS and Oklahoma Tax Commission have received your return, and you still have until April 16, 2012 to pay the tax.

We look forward to seeing you during this filing season. Please book your appointments in advance whenever possible. Use our online scheduling www.amrtax.com .

Respectfully,



Adam Roberts
President

DEPENDENTS

| Name | SS# | Relationship | Birth-date | College Tuition |
|------|-----|--------------|------------|-----------------|
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**DON'T FORGET AMR'S REFERRAL PROGRAM. CASH BACK TO YOU FOR YOUR REFERRALS
NO COUPON REQUIRED.**

List **INTEREST** and/or **DIVIDEND** income by source and amount (Please Bring The Statements):

_____ \$ _____ \$ _____ \$ _____
 _____ \$ _____ \$ _____ \$ _____

List **Other Income:** _____ \$ _____

List **UNEMPLOYMENT COMPENSATION RECEIVED**.....Husband or Single \$ _____ Wife.....\$ _____

List **SOCIAL SECURITY BENEFITS RECEIVED**..... Husband or Single \$ _____ Wife..... \$ _____

List amounts **contributed** to **IRA ACCOUNTS**..... Husband or Single \$ _____ Wife.....\$ _____

Check Box if you **Itemized Your Deductions** last year.....

Student Loan Interest Paid \$ _____

MEDICAL EXPENSES: Please **DO NOT** include amounts paid by **PRE-TAX PAYROLL DEDUCTION**. (Cafeteria Plan)

PRESCRIPTION DRUGS \$ _____ HOSPITALIZATION INS. \$ _____ DENTAL \$ _____
 EYE GLASSES..... \$ _____ HOSPITALS \$ _____ DR. _____ \$ _____
 MISCELLANEOUS..... \$ _____ DR. _____ \$ _____ MEDICAL EQUIPMENT \$ _____

TAXES PAID

REAL ESTATE TAX..... \$ _____ EXCISE TAX \$ _____ \$ _____
 ADDITIONAL STATE TAX PAID WITH LAST YEARS RETURN \$ _____ \$ _____

HOME MORTGAGE INTEREST (List Mortgage Company or individual and amount)

_____ \$ _____ \$ _____ \$ _____

CHARITABLE DONATIONS (List Non-Profit Organization and amount)

CHURCH..... \$ _____ \$ _____ \$ _____
 UNITED WAY/CFC.....\$ _____ \$ _____ \$ _____

MISCELLANEOUS EXPENSES

UNION DUES..... \$ _____ PROF. BOOKS..... \$ _____ TOOLS FOR JOB..... \$ _____
 SAFETY SHOES \$ _____ GLOVES..... \$ _____ UNIFORM EXPENSES... \$ _____
 PROF. EDUCATION.... \$ _____ SAFE DEPOSIT BOX..... \$ _____ TAX SERVICE FEE..... \$ _____

TRAVEL OR AUTO EXPENSES INCURRED ON YOUR JOB

MOTELS & AIRFARE.....\$ _____ CAR RENTAL.....\$ _____ TOTAL MILEAGE..... _____
 MEALS (ACTUAL AMOUNT OR NUMBER OF DAYS AWAY)..... \$ _____ BUSINESS MILEAGE.... _____
 LONG DIST/CELLULAR...\$ _____ INSURANCE, REPAIRS, GAS, OIL, ETC..... _____
 PARKING & TOLLS \$ _____ LOCAL TRANSPORTATION (Taxi, Bus, Train, etc).....\$ _____

ENERGY EFFICIENT HOME IMPROVEMENTS:

WINDOWS.....\$ _____ STORM DOORS.....\$ _____ HIGH EFFICIENCY HVAC SYSTEM (16 SEER OR BETTER).....\$ _____
 INSULATION.\$ _____ OTHER.....\$ _____ HIGH EFFICIENCY WATER HEATER (16 SEER OR BETTER)..\$ _____

CHILD CARE EXPENSES LIST NAME, ADDRESS, SOCIAL SECURITY NO. OR FEDERAL ID NO. OF PROVIDER AND AMOUNT PAID

LIST AMOUNTS PAID THROUGH **PRE-TAX PAYROLL DEDUCTION**...(CAFETERIA PLAN)\$ _____

| NAME | ADDRESS | ID NUMBER | AMOUNT PAID |
|------|---------|-----------|-------------|
| | | | |
| | | | |
| | | | |

RENTAL INCOME AND EXPENSES (Worksheet available if more than one property)

INCOME COLLECTED...\$ _____ LEGAL EXPENSE\$ _____ REAL ESTATE TAXES.... \$ _____
 ADVERTISING..... \$ _____ UTILITIES..... \$ _____ MORTGAGE INTEREST \$ _____
 TRAVEL EXPENSES..... \$ _____ REPAIRS..... \$ _____ CLEANING & MAINT.... \$ _____
 INSURANCE..... \$ _____ SUPPLIES..... \$ _____ _____ \$ _____