

## 2007 Tax Organizer

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This Tax Organizer was created to assist you with the process of information gathering necessary for us to prepare your income tax return. Please include your 2007 information in the designated areas and bring this organizer with you when you meet with us.

Please provide the following information:

1. A copy of your 2006 tax return (if not in our possession).
2. Original form(s) W-2.
3. Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
4. Copies of other compensation or pension documentation, such as Form 1099-MISC or Form 1099-R.
5. Form(s) 1099 or statements reporting dividend and interest income.
6. Brokerage statements showing transactions for stocks, bonds, etc.
7. Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
8. Copies of closing statements regarding the sale or purchase of real property.
9. All other information notices you received, or any items you have questions about.

## Basic Taxpayer Information

Personal Information				
	Taxpayer		Spouse	
Last Name				
First Name				
Middle Initial & Suffix	MI _____	Suffix _____	MI _____	Suffix _____
Social Security Number				
Occupation				
Work Phone/Extension				
Cell Phone				
E-Mail Address				
Birthdate or Age as of 1-1-08	MM/DD/YYYY _____		MM/DD/YYYY _____	
Blind	Yes ____	No ____	Yes ____	No ____
Contribute to Presidential Election Campaign Fund	Yes ____	No ____	Yes ____	No ____
Eligible to be claimed as a dependent on another return	Yes ____	No ____	Yes ____	No ____

Street Address _____	Apartment Number _____
City _____	State _____
Home Phone _____	Foreign Country _____
Fax _____	Foreign Phone _____
	Zip Code _____

### Filing Status

- Single
- Married Filing Jointly
- Married Filing Separately
  - Place a check on this line if you did not live with spouse at any time during the year..... \_\_\_\_\_
  - Place a check on this line if you are eligible to claim spouse's exemption..... \_\_\_\_\_
  - Place a check on this line if your spouse itemizes deductions..... \_\_\_\_\_
- Head of Household
  - If the qualifying person is a child but not your dependent, enter
  - Child's Name \_\_\_\_\_ Child's Social Security Number \_\_\_\_\_
- Qualifying Widow(er)
  - Place a check on the line for the year the spouse died.....2005 \_\_\_\_ 2006 \_\_\_\_

### Dependent Information

Full Name (first name, middle initial, last name, suffix)	Soc. Sec. Number	Relationship	**Code +Months in US	Date of Birth *Not Citizen	2007 Child Care Exp 2006 Child Care Exp

\*\* For the Dependent Code, enter the following:  
 L = dependent child who lived with you  
 N = dependent child who didn't live with you due to divorce or separation  
 O = other dependent  
 + Enter the number of months dependent lived with you, and/or your spouse if married filing jointly, in the U.S.  
 \* Check this box if dependent child is not a U.S. citizen or resident alien.

### General Information

- |   | Yes | No  |
|---|-----|-----|
| 1. Did your marital status change during 2007?.....<br>If yes, explain _____  | ___ | ___ |
| 2. Do you want to allow your tax preparer to discuss this year's return with the IRS?<br>If no, enter another person *if desired) to be allowed to discuss this return with the IRS.<br>Designee's Name _____<br>Phone Number _____ | ___ | ___ |
| 3. Do you or your spouse plan to retire in 2008?.....   | ___ | ___ |
| 4. Were you or your spouse permanently and totally disabled during 2007?.....   | ___ | ___ |
| 5. Enter date of death for taxpayer or spouse(if during 2007 or 2008):<br>Taxpayer:_____Spouse:_____  |     |     |

### Additional Dependent Information

- |   |     |     |
|---|-----|-----|
| 6.a Do you have dependents who must file?.....  | ___ | ___ |
| b If yes, do you want us to prepare the return(s)?.....                                 | ___ | ___ |
| 7.a Do you have children under age 18 with investment income greater than \$1,700?..... | ___ | ___ |
| b If yes, do you want to include your child's income on your return?.....               | ___ | ___ |
| 8. Are any of your dependents not U.S. citizens or residents?.....                      | ___ | ___ |
| 9. Did you provide over half the support for any other person during 2007?.....         | ___ | ___ |
| 10. Did you incur adoption expenses during 2007?.....                                   | ___ | ___ |

### IRA and Pension Plan

- |  |     |     |
|--|-----|-----|
| 11. Did you receive payments from a pension or profit-sharing plan?.....   | ___ | ___ |
| 12. Did you receive a total distribution from an IRA or other qualified plan that was partially<br>or totally rolled over into another IRA or qualified plan within 60 days of the distribution? | ___ | ___ |
| 13. Did you convert all or part of a regular IRA into a Roth IRA?.....   | ___ | ___ |

**Items Related to Income/Losses**

- 14. Did you receive any disability payments in 2007?.....
- 15. Did you receive tip income not reported to your employer?.....
- 16. Did you sell and/or purchase a principal resident in 2007?.....  
(Attach copies of your purchase and/or sale escrow statements.)
- 17. Did you have any installment sale amounts from relatives?.....
- 18. Did you incur any casualty or theft losses during 2007?.....

**Prior Year Tax Returns**

- 19. Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return?.....  
If yes, enclose agent's report or notice of change.
- 20. Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?.....

**Health and Life Insurance**

- 21. Did you or your spouse have self-employed health insurance?.....
- 22. If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?.....
- 23. Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries name by you?.....

**Miscellaneous**

- 24. Did you make energy-efficient improvements to your home or purchase any energy-saving property during 2007?.....  
If yes, attach details.
- 25. Did you purchase a motor vehicle or boat during 2007?.....  
If yes, attach documentation showing sales tax paid.
- 26. Did you purchase a hybrid vehicle in 2007?.....  
If yes, enter year, make, model, and date purchased: \_\_\_\_\_
- 27. Did you donate a vehicle in 2007? If yes, attach Form 1098C.....
- 28. What is the sales tax rate in your locality? \_\_\_\_\_% State ID.....
- 29. Did you or your spouse make gifts of over \$12,000 to an individual or contribute to a prepaid tuition plan?.....
- 30. Did you make gifts to a trust?.....
- 31. If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association?.....  
If yes, please attach details.
- 32. Did you or your spouse participate in a medical savings account in 2007?.....  
If yes, please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)
- 33. Did you pay interest on a student loan for yourself, your spouse, or your dependents?.....
- 34. Did you, your spouse, or your dependents attend post-secondary school in 2007?.....
- 35. Did you receive any income not included in this Tax Organizer?.....

**Electronic Filing and Direct Deposit of Refund**

- 36. If your tax return is eligible for Electronic Filing, would you like to file electronically?
- 37. The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?.....    
If yes, please provide the following information:
  - a Name of your financial institution.....
  - b Routing Transit Number (must begin with 01 through 12 or 21 through 32).....
  - c Account number .....
  - d What type of account is this?.....Checking  Savings
  - e Please attach a **voided** check (not a deposit slip).

**Business/Investment Questions**

- 38. Did you buy or sell any stocks or bonds in 2007?.....    
If yes, please attach broker's information (Form 1099-Bs and annual statements) related to the transactions.
- 39. Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?.....
- 40. Did you sell property or equipment on installment in 2007?.....
- 41. Did you have any business related educational expenses?.....
- 42. Did you do a "like-kind" exchange of property in 2007?.....
- 43. Do you have records, as described below, to support expenses?.....    
Tax law and IRS regulations allow deductions for travel and entertainment if adequate records can be presented. Information must include: 1. Amount; 2. Time and place; 3. Date; 4. Business purpose; 5. Description of gift(s); and Business relationship of recipient.
- 44. Did you purchase special fuels for non-highway use?.....    
If yes, please list the type of use and the number of gallons for each fuel.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_