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## **2008 TAX ORGANIZER**

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**This tax organizer has been prepared for your use in gathering the information needed for your 2008 tax return.**

**To save you time, selected information from your 2007 tax return has been entered within this organizer. Please line through any information which does not apply to your 2008 tax return.**

**In some cases, 2007 amounts have been included in a separate column. These amounts are for comparison purposes only. You do not need to change these prior year amounts.**

**If we may be of further assistance, please contact us at your convenience.**

**REMOVE THIS SHEET PRIOR TO RETURNING THE COMPLETED ORGANIZER**

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## 2008 TAX ORGANIZER

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I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks, or other documents. This information is true, correct, and complete to the best of my (our) knowledge.

<b>Taxpayer Signature</b>	<b>Date</b>
<b>Spouse Signature</b>	<b>Date</b>

<b>Primary E-mail Address</b>	<b>Home Phone</b>	<b>Fax Number</b>
<b>Secondary E-mail Address</b>	<b>Taxpayer's Business Phone</b>	<b>Spouse's Business Phone</b>
<b>Preferred Method of Contact (i.e., cell phone, e-mail, etc.)</b>		

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### Tax Organizer Legend:

Throughout the tax organizer, you will find columns with the heading "TSJ".  
 TSJ Codes - Enter "T" for taxpayer, "S" for spouse or "J" for joint.



For any question answered Yes, please attach supporting detail or documents.

Personal Information:

- Did your marital status change during 2008?  Yes  No
- If married, do you and your spouse want to file separate returns?  Yes  No
- Did your address change during 2008?  Yes  No
- Can you or your spouse be claimed as a dependent by another taxpayer?  Yes  No

Dependents:

- Were there any changes in dependents from the prior year?  Yes  No
- Did you pay for child care while you worked or looked for work?  Yes  No
- Do you have any children under age 18 with unearned income more than \$900?  Yes  No
- Do you have any children age 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and that have unearned income of more than \$900?  Yes  No
- Did you adopt a child or begin adoption proceedings during 2008?  Yes  No

Purchases, Sales and Debt:

- Did you have any debts canceled, forgiven or refinanced during 2008?  Yes  No
- Did you start a new business, purchase a new rental property, farm or acquire any new interest in any partnership or S corporation during 2008?  Yes  No
- Did you sell an existing business, rental property, farm or any existing interest in a partnership or S corporation during 2008?  Yes  No
- Did you sell, exchange or purchase any real estate in 2008? If so, please attach closing statements.  Yes  No
- Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?  Yes  No
- Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan?  Yes  No
- Did you pay any student loan interest in 2008?  Yes  No
- Are your total mortgages on your first and/or second residence greater than \$1,000,000? If so, please provide the principal balance and interest rate at the beginning and the end of the year.  Yes  No
- Did you have an outstanding home equity loan at the end of 2008? If so, please provide the principal balance and interest rate at the beginning and end of the year.  Yes  No
- Did you take out a home equity loan in 2008?  Yes  No
- Are you claiming a deduction for mortgage interest paid to a financial institution for which someone else received the Form 1098?  Yes  No
- Did you engage in any put or call transactions? If Yes, please provide details.  Yes  No
- Did you close any open short sales during 2008?  Yes  No
- Did you sell any securities not reported on your Form 1099-B?  Yes  No





Miscellaneous: (continued)

- Did you engage in any bartering transaction?  Yes  No
- Did you make gifts of more than \$12,000 to any individual?  Yes  No
- Did you have any foreign income or pay any foreign taxes during 2008?  Yes  No

Severance/Retirement:

- Did you retire or change jobs in 2008?  Yes  No
- Did you receive deferred, retirement or severance compensation?  Yes  No

If Yes, enter the date received (Mo/Da/Yr). 

Date

- Did you or your spouse turn age 70 1/2 during the year and have money in an IRA or other retirement account without taking any distribution?  Yes  No

Sale of Your Home:

- Did you sell your home in 2008?  Yes  No
- If Yes, did you own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?  Yes  No
- Did you ever rent out this property?  Yes  No
- Did you ever use any portion of the home for business purposes?  Yes  No
- Have you or your spouse sold a principal residence within the last two years?  Yes  No
- At the time of the sale, the residence was owned by the:  Taxpayer  Spouse  Both

Additional Information:

- With respect to any trust you have created or for which you are the trustee, have any beneficiaries died during 2008?  Yes  No
- Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2008?  Yes  No

If Yes, enter the following:

Name of Designated Beneficiary	Social Security Number	State Sponsoring Plan	Account Number	2008 Amount Contributed



# Personal Information, Dependent(s) and Wages

**Taxpayer:**

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_ Daytime/Work Telephone Number \_\_\_\_\_

Evening/Home Telephone Number \_\_\_\_\_ Primary Email Address \_\_\_\_\_ Secondary Email Address \_\_\_\_\_

**Spouse:**

First Name and Initial \_\_\_\_\_ Last Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Occupation \_\_\_\_\_ Date of Birth (Mo/Da/Yr) \_\_\_\_\_

**Present Mailing Address:**

Street Address \_\_\_\_\_ Apartment Number \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_

Foreign Country \_\_\_\_\_

May the IRS or other taxing authority discuss the return with the preparer? .....

Is the taxpayer claimed as a dependent on someone else's tax return? .....

Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>		
		<b>Taxpayer</b>	<b>Spouse</b>
Yes	No	Yes	No
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are you considered legally blind per IRS regulations? .....

Do you want to contribute to the Presidential Election Campaign Fund? .....

Stimulus payment received before any reductions (If not received, enter -0-) .....

**Dependent Information:**

Did dependent have income over \$3,500?

First Name and Initial	Last Name	Social Security Number	Date of Birth (Mo/Da/Yr)	Relationship to Taxpayer	Months Lived in Your Home	X if Disabled	Yes or No

Please provide the name of any person living with you who is claimed as a dependent on someone else's tax return \_\_\_\_\_

Please list the years for which a release of claim to exemption is given for a dependent child not living with you .....

**Wages and Salaries:** Please enclose all copies of your current year Forms W-2

TS	Employer's Name	Taxable Wages	Tax Withheld				
			Federal	FICA/TIER 1	Medicare	State	Local



# Electronic Filing

**Electronic Filing:** Please enclose all copies of your current year Forms W-2

Electronic filing is the means by which your return is transmitted directly to the IRS. Electronic filing is the only filing method that provides you with acknowledgement that the IRS has received your return and is processing it. If you are to receive a refund and use direct deposit with electronic filing, you will normally receive your refund in about 2 weeks.

Please note that not all returns qualify for electronic filing under IRS rules.

If you qualify for electronic filing, would you like to file the return electronically with the IRS? 

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

Would you like your return prepared and filed electronically when you have a balance due? 

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

Would you like your federal return filed electronically only if your refund is greater than a certain minimum dollar amount? 

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

If Yes, enter the amount here.

If you qualify, would you like to file your state return electronically? 

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

If you file more than one state, do you want to file all of them electronically? 

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

**The IRS has implemented a program to allow taxpayers to e-file without mailing a signature document. In order to participate, please provide a 5-digit self-selected Personal Identification Number (PIN).**

Self-selected PIN:

Taxpayer PIN \_\_\_\_\_

Spouse PIN \_\_\_\_\_



**Direct Deposit and Electronic Withdrawal Account Information:**

The IRS and certain states allow refunds to be deposited directly into your financial institution account, regardless of the means used to file the return. For balance due returns to be filed electronically, the IRS and many states allow the entire amount due to be paid using electronic withdrawal. If you would like to have your refund deposited directly into your account or pay a balance due by using an electronic withdrawal, please complete the following information. If the account should be used for a refund anticipation loan, please mark both the refund anticipation loan box and either the checking or trad. savings box.

(To properly file your return, please attach a voided check or a copy of a monthly statement for your account.)

Owner of account .....  Taxpayer       Spouse       Joint

Select type of account .....  Checking       Trad. Savings       IRA Savings       HSA Savings  
 Archer MSA Savings       Coverdell Ed.Savings       Refund Anticipation Loan

Name of financial institution .....

Financial Institution Routing Transit Number (if known) .....  
 (Use the routing number from a check, NOT a deposit slip. They can be different.  
 The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number .....

Do you want your refund deposited directly into your financial institution account? ..... 

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?

What amount do you want withdrawn if not the entire balance due? .....

What date do you want the withdrawal done? ..... (Mo/Da/Yr) \_\_\_\_\_

Owner of account .....  Taxpayer       Spouse       Joint

Select type of account .....  Checking       Trad. Savings       IRA Savings       HSA Savings  
 Archer MSA Savings       Coverdell Ed.Savings       Refund Anticipation Loan

Name of financial institution .....

Financial Institution Routing Transit Number (if known) .....  
 (Use the routing number from a check, NOT a deposit slip. They can be different.  
 The Routing Transit Number must begin with 01 through 12 or 21 through 32.)

Your account number .....

Do you want your refund deposited directly into your financial institution account? ..... 

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?

What amount do you want withdrawn if not the entire balance due? .....

What date do you want the withdrawal done? ..... (Mo/Da/Yr) \_\_\_\_\_













Individual Retirement Account (IRA):

TS Name of payer

IRA Questions for 2008:

- Are you covered by an employer's retirement plan?
If no, is your spouse covered by an employer's retirement plan?
Do you want to limit your IRA contribution to the maximum amount deductible on your tax return?
If no, do you want to contribute the maximum allowable amount to your IRA even though you may not qualify for an IRA deduction?
Did you receive distributions in 2008 from a traditional IRA, Roth IRA or Qualified Education Account?
Did you convert a traditional IRA to a Roth IRA in 2008?
Did you use your IRA as security for a loan this year?
Did you have any transactions with your IRA during the year?
If Yes, please explain.

Table with 2 columns: Yes, No

IRA Values, Rollovers, and Distributions:

Please enclose copies of all Forms 1099-R

Total value of all traditional IRAs on December 31, 2008
Outstanding rollovers on December 31, 2008
IRA distributions received during 2008
Total distributions converted to Roth IRAs
Amount of Qualified Disaster Recovery Assistance Distributions

Table with 1 column for values

Contributions:

Please enclose copies of all Forms 5498

IRA:

Contributions in 2008 for the 2008 tax return
Contributions in 2009 for the 2008 tax return
Amount for 2008 you choose to be treated as nondeductible

Table with 1 column for values

Roth IRA:

Contributions made for the 2008 tax year

Table with 1 column for values

Pensions and Annuities:

Please enclose all Forms 1099-R and any nontaxable distribution details

Table with columns: TSJ, Name of Payer, 2008 Gross Distributions, Taxable Amount, Federal Tax Withheld, State Tax Withheld, Is this a Rollover?, IRA?, 2007 Gross Distributions

Self-Employed Retirement Plan:

Please enclose copies of all Forms 1099-R

Have you established a self-employed retirement or SIMPLE plan with deductible contributions?
Do you wish to contribute the maximum amount allowed?

Contributions to:

Simplified employee pension
Defined benefit plan
Defined contribution plan
SIMPLE plan

Table with columns: Taxpayer, Spouse, Yes, No, 2008 Amount







Please enclose Forms: W-2G, 1099-MISC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC, 1099-G and 1098-E

Miscellaneous Income and Adjustments:

	TSJ _____		TSJ _____	
	2008 Amount	2007 Amount	2008 Amount	2007 Amount
Taxable pensions and annuities received				
Nontaxable pensions and annuities received				
Federal withholding on pensions and annuities				
State withholding on pensions and annuities				
Unemployment compensation received				
Unemployment compensation repaid in 2008				
Social security benefits received				
Social security benefits repaid in 2008				
Medicare premiums withheld				
Tier 1 railroad retirement benefits received				
Tier 1 railroad retirement benefits repaid in 2008				
Taxable IRA distributions				
Nontaxable IRA distributions				
Total lump sum social security received				
Lump sum taxable social security				
Other federal withholding				
Other state withholding				

State and Local Income Tax Refunds:

TSJ	State	City	Tax Year	Income Tax Refund	
				State	Local

Educator Expenses: (Deduction for amounts paid by educators of kindergarten through Grade 12)

TS	2008 Amount	2007 Amount

Other Income:

TSJ	Nature and Source	2008 Amount	2007 Amount

Other Adjustments to Income: (Please enclose all Forms 1098-E for Student Loan Interest Paid)

TSJ	Nature and Source	2008 Amount	2007 Amount

Alimony Paid or Received:

TSJ	Recipient's Name	Recipient's Social Security No.	Alimony Received?	2008 Amount	2007 Amount





Mortgage Questions for 2008:

		<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you purchased or sold your home, did you include any mortgage interest from your closing statement in the amount below? . . . . .	_____	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance your home? (If Yes, please enclose the closing statement.) . . . . .	_____	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, how many years is your new mortgage loan? . . . . .	_____		
Did you purchase a new home or sell your former home during the year? . . . . .	_____	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, please enclose the closing statements from the purchase and sale of your new and former homes.			
If Yes, also, did you have an ownership interest in a principal residence in the US during the 3 year period prior to the purchase of this home? . . . . .	_____	<input type="checkbox"/>	<input type="checkbox"/>

Home Mortgage Interest Paid To Financial Institutions:

TSJ	Paid To	Did You Receive Form 1098?		2008 Amount	2007 Amount
		Yes	No		

Other Home Mortgage Interest Paid:

TSJ	Paid To		ID Number	2008 Amount	2007 Amount
	Name	Address			

Deductible Points:

TSJ	Paid To	Did You Receive Form 1098?		2008 Amount	2007 Amount
		Yes	No		

Mortgage Insurance Premiums:

Premiums paid or accrued for qualified mortgage insurance.

TSJ	2008 Amount	2007 Amount

Investment Interest Expense:

Interest paid on money you borrowed that is allocable to property held for investment.

TSJ	Paid To	2008 Amount	2007 Amount



Cash Contributions:

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than \$500 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity. Attach Forms 1098-C received from the charity.

Table with 4 columns: TSJ, Organization or Description of Contribution, 2008 Amount, 2007 Amount

Table with 4 columns: TSJ, Conservation Real Property, 2008 Amount, 2007 Amount. Includes rows for 100% limit and 50% limit.

Table with 4 columns: TSJ, Description, 2008 Miles, 2007 Miles. Includes rows for volunteer work before and after July 1, 2008.

Table with 3 columns: TSJ, Description, 2008 Amount. Includes row for cash contributions made on or after May 2, 2008.

Noncash Contributions Totaling Less Than or Equal to \$500:

Table with 4 columns: TSJ, Description of Donated Property, 2008 Amount, 2007 Amount

Noncash Contributions Totaling More Than \$500:

TSJ Description of the donated property

Donee organization name

Donee organization address

Date the property was acquired by the taxpayer (Mo/Da/Yr)

Date the property was donated (Mo/Da/Yr)

Cost or basis of the donated property
Fair market value of the donated property

Which of the following methods was used to determine the fair market value? CAUTION: Generally, contributions in excess of \$5,000 of similar property will require an appraisal (does not apply to marketable securities)

- Appraisal Thrift shop value Catalog Comparable sale

Other - please explain

Which of the following describes how this donated property was acquired?

- Purchase Gift Inheritance Exchange



Miscellaneous Itemized Deductions:

- Union and professional dues .....
- Tax preparation fee .....
- Professional subscriptions .....
- Hobby expense (To extent of income) .....
- Safe deposit box .....
- Uniforms and protective clothing .....
- Work tools .....
- Gambling losses .....
- Estate taxes .....

TSJ	2008 Amount	2007 Amount

Other Itemized Deductions:

Examples:

- Certain legal and accounting fees
- Investment expenses
- Custodial fees
- Employment agency fees
- Certain educational expenses

TSJ	Description	2008 Amount	2007 Amount

Casualty or Theft Loss:

TSJ .....

Property description .....

Which of the following describes the type of property that sustained the casualty or theft loss?

- Personal use
- Business use
- Income producing
- Employee Use
- Personal use due to Hurricane Katrina
- Personal use attributable to a federally declared disaster
- Personal use attributable to Midwestern disaster area

Date acquired ..... (Mo/Da/Yr) \_\_\_\_\_

Date damaged or lost ..... (Mo/Da/Yr) \_\_\_\_\_

Original cost or other basis .....

Fair market value before casualty .....

Fair market value after casualty .....

Cost of replacement .....

Insurance reimbursement .....



Refund Application:

If you have an overpayment of 2008 taxes, do you want the excess:

Refunded [ ] Yes [ ] No
Applied to your 2009 estimated tax liability [ ] Yes [ ] No

Federal Estimated Tax Payments:

2008 1st Quarter Estimate (Due 04-15-2008)
2008 2nd Quarter Estimate (Due 06-16-2008)
2008 3rd Quarter Estimate (Due 09-15-2008)
2008 4th Quarter Estimate (Due 01-15-2009)

Table with 3 columns: Amount Due, Date Paid if Not Date Due (Mo/Da/Yr), Amount Paid

2007 overpayment applied to 2008 estimate [ ]

Tax Planning Information for Tax Year 2009:

Do you expect any of the following to occur in 2009?

- A change in your marital status
A change in the number of your dependents
A substantial change in your income
A substantial change in your withholding
A substantial change in deductions

If you answered Yes to any of the above questions, please provide details.

Empty table for providing details.