2009

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.

Taxpayer Signature	Date
Spouse Signature	Date

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

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

Personal Information:

	Yes	No
Did your marital status change during 2009?		
If married, do you and your spouse want to file separate returns?		
Did your address change during 2009?		
Can you or your spouse be claimed as a dependent by another taxpayer?		

Dependents:

	Yes	No
Were there any changes in dependents from the prior year?		
Did you pay for child care while you worked or looked for work?		
Do you have any children under age 18 with unearned income more than $950?		
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 $950?		
Did you adopt a child or begin adoption proceedings during 2009?		

Purchases, Sales and Debt:

	Yes	No
Did you have any debts canceled, forgiven or refinanced during 2009?		
Did you start a new business, purchase a new rental property, farm or acquire any new interest in any partnership or S corporation during 2009?		
Did you sell an existing business, rental property, farm or any existing interest in a partnership or S corporation during 2009?		
Did you sell, exchange or purchase any real estate in 2009? If so, please attach closing statements.		
Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?		
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?		
Did you pay any student loan interest in 2009?		
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.		
Did you have an outstanding home equity loan at the end of 2009? If so, please provide the principal balance and interest rate at the beginning and end of the year.		
Did you take out a home equity loan in 2009?		
Are you claiming a deduction for mortgage interest paid to a financial institution for which someone else received the Form 1098?		
Did you engage in any put or call transactions? If Yes, please provide details.		
Did you close any open short sales during 2009?		
Did you sell any securities not reported on your Form 1099-B?		

Itemized Deductions:

	Yes	No
Did you contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization?		
Did you incur any casualty or theft losses during the year?		
Did you make any large purchases, such as motor vehicles and boats?		
Did you incur any casualty or loss attributable to a federally declared disaster?		
Did you incur any casualty or loss attributable to the Midwestern disaster area?		

Miscellaneous:

	Yes	No
Did you or your spouse have any transactions pertaining to a medical savings account (MSA) during 2009? If you received a distribution from an MSA, please include Form 1099-SA.		
Did you or your spouse have any transactions pertaining to a health savings account (HSA) during 2009? If you received a distribution from an HSA, please include Form 1099-SA.		
Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?		
Did you or spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity, or deferred compensation plan?		
Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren?		
Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)? If Yes, include Form 1099-Q.		
Did you or your dependents incur any post-secondary education expenses, such as tuition?		
If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job? If Yes, how many months were you covered? Months: ____		
Did you move to a different home because of a change in the location of your job?		
Did you pay in excess of $1,000 in any quarter, or $1,700 during the year for domestic services performed in or around your home to individuals who could be considered household employees?		
Did you receive unreported tip income of $20 or more in any month of 2009?		
Did you or your spouse receive distributions from long-term care insurance contracts? If Yes, please include Form 1099-LTC.		
Were you or your spouse a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account or other financial account in a foreign country?		
Did you create or transfer money or property to a foreign trust?		
Did you purchase a new "hybrid", or alternative technology vehicle, including a qualified plug-in electric drive motor vehicle in 2009?		
Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year?		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?		
Were you notified by the IRS or other taxing authority of any changes in prior year returns?		
Did you lose your job during 2009 because of foreign competition and pay for your own health insurance?		
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?		
Did you install any energy efficiency improvements, or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners or water heaters?		
Were any distributions from your IRA and/or Roth IRA account(s) distributed to a charitable organization?		

Miscellaneous: (continued)

	Yes	No
Did you engage in any bartering transactions?		
Did you have any work outside of the U.S. or pay any foreign taxes?		
Did someone displaced by the storms in the Midwest live with you?		

Gifts:

	Yes	No
Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc., with a total (aggregate) value in excess of $13,000 to any individual during the year?		
Did you or your spouse make any gifts to a trust for any amount during the year?		
Do you or your spouse have a life insurance trust?		
Did you assist in the purchase of any asset (auto, home) for any individual during the year?		
Did you forgive any indebtedness to any individual, trust or entity during the year?		

If you answered Yes to any of the above gift questions, please complete Form 34 and/or 35 in the back of the Organizer.

Severance/Retirement:

	Yes	No
Did you retire or change jobs in 2009?		
Did you receive deferred, retirement or severance compensation?		

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

Date

Sale of Your Home:

	Yes	No
Did you sell your home in 2009?		
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?		
Did you ever rent out this property?		
Did you ever use any portion of the home for business purposes?		
Have you or your spouse sold a principal residence within the last two years?		

At the time of the sale, the residence was owned by the: ☐ Taxpayer ☐ Spouse ☐ Both

Additional Information:

	Yes	No
With respect to any trust you have created or for which you are the trustee, have any beneficiaries died during 2009?		
Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2009?		

If Yes, enter the following:

Name of Designated Beneficiary	Social Security Number	State Sponsoring Plan	Account Number	2009 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 ____

	Yes	No
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?		

	Taxpayer		Spouse	
	Yes	No	Yes	No
Are you considered legally blind per IRS regulations?				
Do you want to contribute to the Presidential Election Campaign Fund?				

Dependent Information:

Did dependent have income over $3,650?

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/TIER1	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.

	Yes	No
If you qualify for electronic filing, would you like to file the return electronically with the IRS?		
Would you like your return prepared and filed electronically when you have a balance due?		
Would you like your federal return filed electronically only if your refund is greater than a certain minimum dollar amount?		
If Yes, enter the amount here.		
If you qualify, would you like to file your state return electronically?		
If you file more than one state, do you want to file all of them electronically?		

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 Withdrawal

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.

(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

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 . . . . ____________________

	Yes	No
Do you want your refund deposited directly into your financial institution account?	☐	☐
Do you want to use any of your refund to purchase any Series I U.S. Savings Bonds?	☐	☐
If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?	☐	☐
What amount of your refund, if not the entire refund, do you want to use to purchase Series I U.S. Savings Bonds?		
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

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.
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Your account number . . . . ____________________

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Do you want your refund deposited directly into your financial institution account?	☐	☐
Do you want to use any of your refund to purchase any Series I U.S. Savings Bonds?	☐	☐
If you are filing a balance due return electronically, do you want to pay the amount due using an electronic withdrawal?	☐	☐
What amount of your refund, if not the entire refund, do you want to use to purchase Series I U.S. Savings Bonds?		
What amount do you want withdrawn if not the entire balance due?		

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

2009 Tax Return Checklist

Client Name: . . . . ______________________

Income:

	Prior Year	Current Year
Wages (IRS W-2)		
Interest Income (IRS 1099-INT)		
Dividend Income (IRS 1099-DIV)		
Brokerage Statements (Form 1099-A,B,S)		
IRA/Pension/Annuity Income (IRS 1099R)		
Schedule K-1s (IRS K-1)		
Miscellaneous Income (IRS-1099-MISC, G)		

Itemized Deductions:

	Prior Year	Current Year
Medical/Dental Expenses		
Real Estate Taxes		
Property Taxes		
Mortgage Interest (Form 1098)		
Charitable Contributions		

Other:

	Prior Year	Current Year
Estimated Tax Payments		

* Please provide any tax related information not listed above, e.g. new brokerage statements, K-1 investments, etc.