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2007 TAX ORGANIZER

Taxpayer Information

Last name .... ______
First name .... ______
Middle Initial .... ______ Suffix ...... ______
Social security number .... ______
Date of birth .... ______
Occupation .... ______
Work phone .... ______ Ext .. ______
Cell phone .... ______
E-mail address .... ______

Spouse Information

Last name .... ______
First name .... ______
Middle Initial .... ______ Suffix ...... ______
Social security number .... ______
Date of birth .... ______
Occupation .... ______
Work phone .... ______ Ext .. ______
Cell phone .... ______
E-mail address .... ______

Address .... ______ Apartment number ..... ______
City .... ______ State .... ______ ZIP Code .... ______
Home phone ..... ______ Fax number .... ______

Dependent Information

First name / Last name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Student First Name	MI	Suffix	Student Last Name	Social Security Number

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2007 qualified student loan interest .... ______

Attach Form(s) W-2 — Wages, Salaries, Tips and Other Compensation

Employer Name	2006 Amount

Attach Form(s) 1099-R — Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	2006 Amount

Attach Form(s) SSA-1099 — Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099		
Railroad Retirement Benefits from Form RRB-1099		
Medicare B premiums withheld		
Medicare D premiums withheld		

Attach Form(s) 1099-MISC — Miscellaneous Income

1099-MISC Payer Name

Attach Form(s) 1099-INT — Interest Income

1099-INT Payer Name	2006 Amount

Attach Form(s) 1099-DIV — Dividend Income

1099-DIV Payer Name	2006 Amount

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G — Certain Government Payments, Schedule K-1s — Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G — Gambling or Lottery Winnings, Form(s) 1099-Q — Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made for 2007		
Roth IRA contributions made for 2007		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

Medical and Dental Expenses

	2007 Amount	2006 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		

Taxes

	2007 Amount	2006 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses

Home mortgage interest paid — Attach Form(s) 1098.

Lender's Name	2007 Amount	2006 Amount

Points paid on loan to buy, build or improve main home

Lender's Name	2007 Amount

Cash/Check/Credit Contributions

	2007 Amount	2006 Amount

Noncash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions

	2007 Amount	2006 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		

		Yes	No
1	Did you make energy-efficient improvements to your home or purchase any energy-saving property during 2007? If **yes,** attach details	☐	☐
2	Did you purchase a motor vehicle or boat during 2007? If **yes,** attach documentation showing sales tax paid.	☐	☐
3	Did you purchase a hybrid vehicle in 2007? If **yes,** enter year, make, model, and date purchased: ______	☐	☐
4	Did you donate a vehicle in 2007? If **yes,** attach Form 1098C	☐	☐
5	What was the sales tax rate in your locality in 2007? ______ % State ID ____		
6	Did your marital status change during 2007? If **yes,** explain: ______	☐	☐
7	Were you or your spouse permanently and totally disabled in 2007?	☐	☐
8	Do you have dependents who must file?	☐	☐
9	Do you have children under age 18 with investment income greater than $1,700?	☐	☐
10	Did you provide over half the support for any other person during 2007?	☐	☐
11	Did you incur adoption expenses during 2007?	☐	☐
12	Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	☐	☐
13	Did you receive any disability payments in 2007?	☐	☐
14	Did you receive tip income **not** reported to your employer?	☐	☐
15	Did you buy, sell or refinance a principal residence or other real property in 2007? If **yes,** attach closing or escrow statements.	☐	☐
16	Did you incur any casualty or theft losses during 2007?	☐	☐
17	Did you incur any non-business bad debts?	☐	☐
18	Did you pay any individual for domestic services in 2007?	☐	☐
19	Did you buy or sell any stocks or bonds in 2007?	☐	☐
20	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
21	Did you incur any moving expenses? If **yes,** attach details	☐	☐
22	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐
23	Do you expect your income and deductions in 2008 to be the same as 2007? If **no,** attach explanation of changes expected.	☐	☐
24	If you paid any alimony, enter recipient's SSN: ______ Alimony paid: ______		
		Taxpayer	**Spouse**
25	Enter your state of residence	______	______

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
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 a voided check (not a deposit slip) if your bank account information has changed.

What type of account is this? . . . . Checking ☐ Savings ☐

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)

Please see additional questions - attached.

2007 Additional Tax Questions

Y / N – Have you received any IRS or state tax agency notices? If so please enclose.

Y / N – If you refinanced your home, did the new loan value exceed the old loan by more than $100,000?

Y / N – Have you made any gifts to one person totaling more than $12,000?

Y / N – Do you own any securities that became worthless during the year?

2008 Planning Questions

Y / N – Do you have a will?

Y / N – Do you have a formal financial plan for retirement years?

Y / N – Are you planning to buy a house or refinance this year?

Y / N – Are you planning to start a new business this year?

Each of these strategies has tax implications, and we encourage you to contact us for guidance on the tax aspects of these items before implementing.

We also can recommend trusted legal, financial, real estate and technology professionals that we work with who can assist you in their respective fields.