2007 Tax Organizer

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2007 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2007 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2006 information is included for your reference. You do not need to make any 2006 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

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

Thank you for taking the time to complete this Tax Organizer.

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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.)

General Questions

PERSONAL INFORMATION

Yes No

1 Did your marital status change during 2007? ☐ ☐
If **yes,** explain . . . . . . ______

2 Do you want to allow your tax preparer to discuss this year's return with the IRS? ☐ ☐
If **no,** enter another person (if desired) to be allowed to discuss this return with the IRS.
Caution: Review any transferred information for accuracy.

Designee's Name . . . . ► ______
Phone Number . . . . . . ► ______ Personal Identification Number (5 digit PIN) . . . . ► ______

3 Do you or your spouse plan to retire in 2008? ☐ ☐

4 Were you or your spouse permanently and totally disabled in 2007? ☐ ☐

5 Enter date of death for taxpayer or spouse (if during 2007 or 2008): Taxpayer: Spouse:

DEPENDENT INFORMATION

Yes No

6a Do you have dependents who must file? ☐ ☐
b If **yes,** do you want us to prepare the return(s)? ☐ ☐

7a 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

Yes No

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 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? ☐ ☐

14 Did you contribute to a Coverdell Education Savings Account? ☐ ☐

ITEMS RELATED TO INCOME/LOSSES

Yes No

15 Did you receive any disability payments in 2007? ☐ ☐

16 Did you receive tip income **not** reported to your employer? ☐ ☐

17 Did you buy, sell or refinance a principal residence or other real property in 2007? ☐ ☐
(Attach copies of your purchase and/or sale escrow statements.)

18 Did you have any installment sale amounts from relatives? ☐ ☐

19 Did you incur any casualty or theft losses during 2007? ☐ ☐

20 Did you incur any non-business bad debts? ☐ ☐

PRIOR YEAR TAX RETURNS

Yes No

21 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.

22 Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return? ☐ ☐

General Questions (continued)

FOREIGN BANK ACCOUNTS AND TAXES

		Yes	No
23	Did you have foreign income or pay any foreign taxes in 2007?	☐	☐
24	At any time during the tax year, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	☐	☐
	If **yes,** enter the name of the foreign country: ______		
25	Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?	☐	☐

HEALTH AND LIFE INSURANCE

		Yes	No
26	Did you or your spouse have self-employed health insurance?	☐	☐
27	If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?	☐	☐
28	Did your employer pay premiums on life insurance in excess of $50,000 where the proceeds are payable to beneficiaries named by you?	☐	☐

MISCELLANEOUS

		Yes	No
29	Did you make energy-efficient improvements to your home or purchase any energy-saving property during 2007? If **yes,** attach details	☐	☐
30	Did you start paying mortgage insurance premiums in 2007? If **yes,** please attach details	☐	☐
31	Did you purchase a motor vehicle or boat during 2007?	☐	☐
	If **yes,** attach documentation showing sales tax paid.		
32	Did you purchase a hybrid vehicle in 2007?	☐	☐
	If **yes,** enter year, make, model, and date purchased: ______		
33	Did you donate a vehicle in 2007? If yes, attach Form 1098C	☐	☐
34	What is the sales tax rate in your locality? ______ % State ID ______		
35	Did you or your spouse make gifts of over $12,000 to an individual or contribute to a prepaid tuition plan?	☐	☐
36	Did you make gifts to a trust?	☐	☐
37	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.		
38	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.)		
39	Did you make a loan at an interest rate below market rate?	☐	☐
40	Did you pay any individual for domestic services in 2007?	☐	☐
41	Did you pay interest on a student loan for yourself, your spouse, or your dependents?	☐	☐
42	Did you, your spouse, or your dependents attend post-secondary school in 2007?	☐	☐
43	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

		Yes	No
44	If your tax return is eligible for Electronic Filing, would you like to file electronically?	☐	☐
45	The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

Caution: Review transferred information for accuracy.

46 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 ☐

► ✔ Please attach a **voided** check (not a deposit slip) if your bank account information has changed.

Business/Investment Questions

		Yes	No
1	Did you receive stock from a stock bonus plan with your employer? (Do not include stock sales included on your W-2.)	☐	☐
2	Did you buy or sell any stocks or bonds in 2007? If **yes**, attach broker's information (such as Form 1099-Bs and broker annual statements) related to the transactions.	☐	☐
3	Did you surrender any U.S. savings bonds during 2007?	☐	☐
4	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	☐	☐
5	Did you realize a gain or loss on property which was taken from you by destruction, theft, seizure, or condemnation?	☐	☐
6	Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?	☐	☐
7	Do you have any investments for which you were **not** personally 'at risk' (other than sole proprietorship or farm)?	☐	☐
8	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC) during 2007;?	☐	☐
9	Did you sell property or equipment on installment in 2007?	☐	☐
10	Did you have any business related educational expenses?	☐	☐
11	Did you do a 'like-kind' exchange of property in 2007?	☐	☐
12	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 **6** Business relationship of recipient.

		Yes	No
13	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.	☐	☐

____

____

____

____

____

		Yes	No
14	Was Form 8903 (Domestic Production Activities Deduction) included in your 2006 federal income tax return?	☐	☐

Additional Information

Basic Taxpayer Information

PERSONAL INFORMATION

	TAXPAYER		SPOUSE	
Last name				
First name				
Middle initial and suffix	MI	Suffix	MI	Suffix
Social security number				
Occupation				
Work phone/extension				
Cell phone				
E-mail address				
Birthdate **or** age as of 1-1-2008	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 ______ ZIP code ______

Home phone ______ Foreign country ______

Fax ______ Foreign phone ______

FILING STATUS

☐ **1** Single

☐ **2** Married filing jointly

☐ **3** Married filing separately

Check this box if you **did not** live with spouse at any time during the year ► ☐

Check this box if you are eligible to claim spouse's exemption ► ☐

Check this box if your spouse itemizes deductions ► ☐

☐ **4** Head of household

If the qualifying person is a child but not your dependent, enter

Child's name ______ Child's social security number ______

☐ **5** Qualifying widow(er)

Check the box for the year the spouse died ► 2005 ☐ 2006 ☐

DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)				Social Security Number / Relationship	**Code / +Months in U.S.	Date of Birth / *Not Citizen	2007 Child Care Expense / 2006 Child Care Expense
						☐	
						☐	
						☐	
						☐	

** 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

Q = not a dependent (but is a person who qualifies you for the earned income credit and/or the child tax credit and/or the credit for child and dependent care expenses)

+ 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

Interest and Dividend Income

T = Taxpayer, **S** = Spouse, **J** = Joint

INTEREST INCOME

☑ **Attach all copies of your Form 1099-INTs here.**

**Type of Interest
blank = Regular taxable interest
M = State use only

TSJ	X*	Payer Name	2007 Box 1 Interest	Type of Interest**	2007 Box 3 US/Treasury Interest	2007 Box 8 Tax Exempt	State	2006 Box 1 or 3

X* Check if you did not receive income from this account in 2007.

DIVIDEND INCOME

☑ **Attach all copies of your Form 1099-DIVs here.**

TSJ	X*	Payer Name	2007 Box 1a Ordinary Dividends	2007 Box 1b Qualified Dividends	2007 Box 2a Capital Gains	State	2006 Box 1a + 2a

X* Check if you did not receive income from this account in 2007.

Rent and Royalty Income and Expenses

BASIC PROPERTY INFORMATION

Property type: ______________________ Property location: ______________________

		Yes	No
1	Check property owner . . . . ☐ **Taxpayer** ☐ **Spouse** ☐ **Joint**		
2	Enter the ownership percentage (if not 100%) . . . . . . ______		
	If not 100%, are you reporting 100% of the income and expenses?	☐	☐
3	Check this box if some of this investment was **not** at-risk	☐	
4	Is this a rental property? (If **yes,** answer questions 5 through 7; if **no,** skip to question 8.)	☐	☐
5	Did you have personal use of this rental property?	☐	☐
	If **yes,** enter number of days: Rented . . . . . . ______ Personal use . . . . . . ______ Owned . . . . . . ______		
6	Does this rental have multiple living units and you live in one of the units?	☐	☐
	If **yes,** enter percentage of rental use . . . . . . ______		
7	Did you actively participate in this property's management during 2007?	☐	☐
8	Did you materially participate in this property's management during 2007?	☐	☐
9	Do you want to treat this property as non-passive?	☐	☐
10	Did you fully dispose of this property during 2007?	☐	☐
11	Did this property have unallowed passive losses in 2006?	☐	☐
12	Do you want to treat this property as commercial property?	☐	☐
13a	Treat all MACRS assets for this activity as qualified Indian reservation property?	☐	☐
b	Treat all assets acquired after August 27, 2005 as qualified GO Zone property? . . . . . . **Regular** ☐ **Extension** ☐ **No** ☐		

Complete ORG51 for Asset Acquisitions and ORG50 for Dispositions.

	INCOME	2007	2006
14	Rents received		
15	Royalties received		

	EXPENSES	2007	2006
16	Advertising		
17a	Automobile (complete ORG18 for autos)		
b	Travel		
18	Cleaning and maintenance		
19	Commissions		
20	Insurance		
21	Legal and professional fees		
22	Management fees		
23a	Mortgage interest paid to banks – qualified		
b	Mortgage interest paid to banks – other		
24	Other interest		
25	Repairs		
26	Supplies		
27a	Real estate taxes		
b	Other taxes		
28	Utilities		
29	Other expenses:		
a	______________________		
b	______________________		
c	______________________		
d	______________________		
e	______________________		
30a	Depreciation and Section 179 deduction **(Preparer Use Only)**		
b	Depletion **(Preparer Use Only)**		