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This Tax Organizer is designed to help you collect and report the information needed to prepare your 2009 individual income tax return. **If you have any business entities other than LLCs treated as sole proprietorships, please complete the Business entity organizer for the information that applies to those entities.** 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 2009 information in the designated areas on the worksheets. If you need to include additional information you please include additional pages.

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:

- ✓ Signed copy of the tax engagement letter
- ✓ A copy of your 2008 tax returns (if not in our possession) and QuickBooks files if available.
- ✓ 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.

2009 TAX ORGANIZER

Taxpayer Information

Last name ___________________________

First name ___________________________

Middle Initial ______

Social security number ___________________________

Date of birth ___________________________

Occupation ___________________________

Work phone ___________________Cell phone ________________E-mail ________________________

Address ____

City ___________________________ State _____________ Zip Code ______________

Home phone __________________ Fax Number ___________________

Spouse Information

Last name ___________________________

First name ___________________________

Middle Initial ______

Social security number ___________________________

Date of birth ___________________________

Occupation ___________________________

Work phone ___________________Cell phone ________________E-mail ________________________

Dependents

First Name / Last Name	MI / Suffix	SSN / Relationship	Date of Birth	Months lived with Taxpayer	Child Care Expenses

General Questions

		Yes	No
1	Did you purchase a motor vehicle or boat during 2009? *If yes, attach documentation showing sales tax paid.*	[ ]	[ ]
2	Did your marital status change during 2009? If yes, explain: _______________________	[ ]	[ ]
3	Were you or your spouse permanently and totally disabled in 2009?	[ ]	[ ]
4	Do you have dependents who must file?	[ ]	[ ]
5	Do you have children under age 24 with investment income greater than $1800?	[ ]	[ ]
6	Did you provide over half the support for any other person during 2009?	[ ]	[ ]
7	Did you incur adoption expenses during 2009?	[ ]	[ ]
8	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 with in 60 days of the distribution?	[ ]	[ ]
9	Did you convert all or part of a regular IRA into a Roth IRA?	[ ]	[ ]
10	Did you receive any disability payments in 2009?	[ ]	[ ]
11	Did you operate an unincorporated business? ***Please complete the Sole Proprietor Business Income and Expense Organizer.***	[ ]	[ ]
12	Are you a Realtor who receives a 1099 under your social security number? ***Please complete the Realtor Income and Expense Organizer.***	[ ]	[ ]
13	Did you start or operate an S corporation, Partnership or Limited Liability Company in 2009? ***If yes please complete the business entity organizer.***	[ ]	[ ]
14	Did you use an automobile for your business in 2009? ***Please complete the Car and Truck Organizer***	[ ]	[ ]
15	Did you maintain a home office in 2009? ***Please complete the Home Office organizer***	[ ]	[ ]
16	Did you receive tip income not reported to your employer?	[ ]	[ ]
17	Do you own rental or investment real estate? ***Please complete the Rent and Royalty Income and Expense Organizer for each property And include purchase documents and mortgage interest statements.***	[ ]	[ ]
18	Are you a first time home buyer? *You have not owned a principle residence in 3 years.*	[ ]	[ ]
19	Did you buy, sell or refinance a principal residence or other real property in 2009 *If yes, attach closing or escrow statements (HUD 1).*	[ ]	[ ]
20	Did you invest in oil and gas? If yes please send K-1	[ ]	[ ]
21	Did you invest in any partnerships? If yes, please send K-1(s) ***(K-1s typically come late so please send everything else in first then send the K-1s when you get them later.)***	[ ]	[ ]
22	Did you incur any casualty or theft losses during 2009?	[ ]	[ ]
23	Did you incur any non-business bad debts?	[ ]	[ ]
24	Did you pay any individual for domestic services in 2009?	[ ]	[ ]
25	Did you buy or sell any stocks or bonds in 2009? ***Please complete Sales of Stocks and Securities Organizer***	[ ]	[ ]
26	Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?	[ ]	[ ]
27	Did you incur any moving expenses? If yes, attach details	[ ]	[ ]
28	Did you receive any income not included in this Tax Organizer? If yes, please attach information	[ ]	[ ]
29	Were you notified by the IRS or state taxing authority of changes to a prior year's return? ***If yes, enclose copy of notice or report.***	[ ]	[ ]
30	Do you expect your income and deductions in 2010 to be the same as 2009? *If no, attach explanation of changes expected.*	[ ]	[ ]

31 If you paid any alimony, enter recipient's SSN: _________________ Alimony paid: ______________

32 Enter your state of residence Taxpayer __________ Spouse ___________

33	Did you have foreign income or pay foreign taxes in 2009?	[ ]	[ ]
34	At any time during the year did you have an interest in or signature or other authority over a bank account or other financial account in a foreign country?	[ ]	[ ]
35	Did you purchase a hybrid vehicle in 2009?	[ ]	[ ]
36	Were any of your properties foreclosed or short-sold – include your personal residence? ***If yes attach forgiveness of debt organizer***	[ ]	[ ]
37	Did you file for bankruptcy, or have a bankruptcy filing discharged, in 2009?	[ ]	[ ]
38	Did you modify any mortgages or Loans	[ ]	[ ]
	*If yes, please provide details		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically	[ ]	[ ]

California returns must be e-filed

The Internal Revenue Service is able to deposit many refunds directly into taxpayer's accounts.

If you receive a refund would you like direct deposit	[ ]	[ ]
If you have a tax balance due, would you like to have the amount debited from your account?	[ ]	[ ]

If yes, please provide a voided check (not a deposit slip).

What type of account is this Checking [ ] Savings [ ]

Estimated Tax Paid

Date	Federal	State____	State_____	Local_____
_________	_________	_________	_________	_________
_________	_________	_________	_________	_________
_________	_________	_________	_________	_________
_________	_________	_________	_________	_________

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

CHILD AND DEPENDENT CARE & EDUCATION EXPENSES

Attach Form(s) 1098-T Tuition Statement

Child and Dependent Care Provider Expenses				
Name	Address	Id Number	Phone Number	Amount Paid

Education Tuition and Fees				
Students First Name	Students Last Name	MI	SSN	Qualified Expenses

Attach Interest Statement
Student Loan Interest Paid

Enter total 2009 qualified student loan interest

Taxpayer ____________________

Spouse ____________________

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

Employer Name

You

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Spouse

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Attach Form(s) 1099-INT – Interest Income
1099-INT Payer Name

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Interest You Received But You Did Not Receive a 1099

Payer Name	Interest Received
______________________________	______________________
______________________________	______________________
______________________________	______________________
______________________________	______________________
______________________	

Attach Form(s) 1099-DIV – Dividend Income
1099-DIV Payer Name

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Attach Any Form 1099-INT or 1099-DIV issued to you children

Childs Name	1099 Payer Name
______________________	______________________
______________________	______________________
______________________	______________________
______________________	______________________
______________________	______________________

Attach Form(s) 1099-B, Sales of Stocks, Bonds and Securities
1099–B Issuer

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Please complete the Sales of Stocks and Securities Organizer. The organizer can be found at http://www.tacpas.com/Tax_Organizer.html

Attach Form(s) 1099-S, Sales Real Estate
Address of property sold

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Please also attach the HUD-1 closing statement for both the purchase and sale of the property. If you did a 1031 exchange then also attach a copy of the report from Qualified Intermediary.

Attach Form(s) 1099 - C, Cancellation of Debt Income
Attach any additional information

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Attach Form(s) 1099 – A, Abandonments
Attach any additional information

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Attach Form(s) 1099-R — Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAS, etc
1O99-R Payer Name

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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	___________	_________

Other Government Forms to attach:
Form(s) 1099-G — Certain Government Payments (including unemployment compensation), Form(s) W-2G — Gambling or Lottery Winnings, Form(s) 1099-0 — Payments from Qualified Education Programs

Other Income:
Alimony, jury duty, unreported tips, disability Income, etc.

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Attach Form(s) 1099-MISC – Miscellaneous Income

1099-MISC Payer Name

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If you have a Sole Proprietorship Business (this includes Single Member Disregarded LLCs) please complete the Sole Proprietor Income and Expenses Organizer. The organizer can be found at http://www.tacpas.com/Tax_Organizer.html

	Taxpayer	Spouse
Retirement Plan Contributions		
Traditional IRA contributions made for 2009	______________	_______________
Roth IRA contributions made for 2009	______________	________________
SEP, Individual 401(k) or SIMPLE Contributions	______________	________________
Educator Expenses	______________	________________

(Eligible educators may deduct up to $250 for books, supplies and materials used in their class room. An Eligible educator is a person who is a K – 12th grade teacher, instructor, counselor, principle or aide who spends at least 900 hours per school year)

Health Savings Account Contribution ____________

Health Savings Account Distribution ____________

Medical and Dental Expenses	**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

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 properly taxes	____________________

Interest Expenses

Home mortgage interest paid on personal residence or vacation home **(not investment properties)** – **Attach Form(s) 1098. Lenders Name.** Please note that you may only deduct interest on acquisition mortgages of $1,000,000 or less and home equity loans of $100,000 or less. Please indicate loans over these limits

____	____________________
____	____________________
____	____________________

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

____	____________________
____	____________________

Rules for deducting charitable contributions.

The rules for charitable deductions have become much stricter than in past years**.**

For Cash and Credit Card Contributions

No deduction will be allowed for contributions of cash, checks, or other monetary gifts, *regardless of the amount,* unless you have either 1) a bank record (canceled check), 2) a receipt, letter or other written communication from the donee, indicating the donee's name, and the contribution date and amount.

For contributions of $250 or more must be substantiated by a contemporaneous written acknowledgement from the donee. Generally the acknowledgement must contain the amount of the contribution and a good-faith estimate of the value of any goods or services received in exchange for the contribution.

For Non-Cash Contributions

Donations of clothing or household items that are not in "good" used condition or better will only be allowed if the item has a value of more than $500 and a qualified appraisal is attached to the return. The donation of qualified vehicle (car, truck, boat or aircraft) valued at over $500 must be substantiated with a form 1098-C issued by the donee. The form 1098 must be attached to the tax return.

For donations with a value of less than $250 you must have a receipt from the donee indicating the donee's name, the date and location of the donation, and a detailed description of each donated item (the value is not required to be on the receipt).

For donations with a value of $250 or more must be substantiated by a contemporaneous written acknowledgement from the donee. Generally the acknowledgement must contain a detail description of the item contributed and a good-faith estimate of the value of any goods or services received in exchange for the contribution.

For donations of more than $5,000 must in addition attach a qualified appraisal to the tax return.

DO NOT INCLUDE ANT CONTRIBUTIONS THAT DO NOT COMPLY WITH THE ABOVE RULES this is a hot item for the IRS.

Charitable Contributions – Cash or Credit Card

Charitable Organization

____	____________________
____	____________________
____	____________________
____	____________________
____	____________________
____	____________________

Non-Cash 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.

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Miscellaneous Deductions (<u>do not include expenses for your sole proprietorship</u>)

Employee Business Expenses (these are related to you W-2 income)

Vehicle expenses – Please complete Car and Truck Organizer at http://www.tacpas.com/Tax_Organizer.html

Union and professional dues ____________________

Professional subscriptions, books, supplies ____________________

Uniforms and protective clothing (including cleaning) ____________________

Job search costs ____________________

Other unreimbursed employee expenses (list):

Parking fees, tolls, and local transportation ____________________

Travel expenses (excluding meals and entertainment) ____________________

Business gifts ____________________

Education ____________________

____ ____________________

____ ____________________

____ ____________________

____ ____________________

Amount reimbursed by employer for above expenses ____________________

Other Miscellaneous Deductions

Tax return preparation fees ____________________

Investment counsel and advisory fees ____________________

Certain attorney fees (please describe purpose) ____________________

Safe deposit box rental ____________________

Gambling losses (to the extent of gambling income) ____________________

IRA custodial fees ____________________

Other miscellaneous deductions (list):

____ ____________________

____ ____________________

____ ____________________

____ ____________________