

TAX ORGANIZER for 2008

(page 1 of 3)

Name: _____
Address: _____
City: _____
State: _____ Zip Code: _____

Social Security #: _____
Home Phone #: _____
Cell Phone #: _____

Spouse: _____
Address: _____
City: _____
State: _____ Zip Code: _____

Social Security #: _____
Home Phone #: _____
Cell Phone #: _____

If any of the following items apply to you or your spouse,
please mark Y for "Yes" or N for "No" after the question, and if possible, include details.

BASIC INFORMATION

Y = Yes , N = No

- 1 Did your marital status change since last year?
- 2 Are there any changes in your dependents from last year?
- 3 Did you have any children under 19 (or 24 if a full time student) who received more than \$850 in investment income?
- 4 Are all your dependents either US residents or citizens?
- 5 Did you provide over half of the support for someone you aren't claiming as a dependent?
- 6 Are you being claimed (or are eligible to be claimed) as a dependent on anyone else's return?
- 7 Were either you or your spouse in the military or National Guard?
- 8 Did you purchase or sell your principal residence?
- 9 Have you been notified by the IRS of changes to a prior year's return, or received any other tax correspondence?
- 10 Were there any changes to a prior year's income, deductions, or credits?
- 11 Did you make gifts of more than \$12,000 to anyone person?
- 12 Did you file Form 8839, Adoption Credit, in a previous year?
- 13 Did you purchase any special fuels for non-highway use?
- 14 Do you want to e-file your return?
- 15a If you are due a refund, how do you want to receive it?
 Direct deposit (please provide a voided blank check)
 Check sent to you in the mail
 Apply to next year's estimates
- 15b If you owe taxes, how do you want to pay them?
 Paper check sent with my return
 Direct debit from my bank account (please provide a voided blank check)

continued on next page

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continued (page 2 of 3)

INCOME

Y = Yes , N = No

- 16 Did you have an interest in or signature authority over a financial account in a foreign country?
- 17 Were you the grantor of or transferor to a foreign trust?
- 18 Did you receive income from a foreign source or pay taxes to a foreign government?
- 19 Did you barter your services for goods or services from someone else?
- 20 Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account?
- 21 Did you make a loan to someone at an interest rate below market rate?
- 22 Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?
- 23 Did you cash in any U.S. savings bonds?
- 24 Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)?
- 25 Did you itemize your deductions in a previous year and receive a state or local refund, or a refund of any other deduction you itemized, in 2008? (If yes, attach Form 1099-G)
- 26 Did you receive disability income?
- 27 Do you have gambling winnings? (If yes, be sure to include in gambling expenses)
- 28 Did you receive any unemployment benefits?
- 29 During 2008, did you receive payments from a Long-Term Care insurance contract?
- 30 Did you receive employer-provided adoption benefits for a previous year?
- 31 Did you receive any distributions from a retirement plan? (If Yes, attach all 1099-Rs)
- 32 Did you "roll over" a retirement plan distribution into another plan?
- 33 Did you receive Social Security benefits?
- 34 Did you convert a traditional IRA to a Roth IRA?
- 35 Did you exchange any securities or investments for something other than cash?
- 36 Do you have any short sales, commodity sales, or straddles?
- 37 Did you receive Form 2439?
- 38 Did you buy or sell any bonds?
- 39 Did you receive stock from a stock bonus plan with your employer?
- 40 Did you sell any other personal assets at a gain?
- 41 Did you sell any real estate (other than your home) during the year?
- 42 Did you sell any assets using the installment method?
- 43 Did you receive proceeds from a prior year installment sale?
- 44 Did you purchase a rental property?
- 45 Did you exchange any property for other property?
- 46 Did you receive any income not reported in this Organizer?

BUSINESS AND RENTAL PROPERTY INCOME

Y = Yes , N = No

- 47 If you own rental property, do you qualify as a Real Estate Professional?
- 48 Did you start or acquire a new business?
- 49 Did you sell any part of an existing business, or sell business assets?
- 50 Did you cease operating any business or rental property?
- 51 Did you remove any of your business assets for personal use?

continued on next page

