2008 TAX ORGANIZER

Taxpayers Names: ____________________________

Personal Data:

Your Date of Birth	
Wife's Date of Birth	
Your home phone	
Your work phone	
Wife's work phone	
Your Cell phone	
Wife's Cell phone	

Mailing Address for tax return:

Best Email (we will assume it is private and safe)

Your Dependent Children:

Name	D.O.B.	Social Sec #

2008 ESTIMATED TAXES

List only payments made with your 2008 estimated tax vouchers

Federal Taxes:	Check Amount	Date Paid
Voucher #1	_______	4/15/08
Voucher #2	_______	6/15/08
Voucher #3	_______	9/15/08
Voucher #4	_______	1/15/09

State Taxes:	Check Amount	Date Paid
Voucher #1	_______	4/15/08
Voucher #2	_______	6/15/08
Voucher #3	_______	9/15/08
Voucher #4	_______	12/31/08

If any of these payments were not made by the due date, please indicate when paid

Misc. Items:

(IF THESE ARE NOT ANSWERED, WE WILL ASSUME YOUR ANSWER TO BE "NO")

IRA Contributions for 2008 (max $5,000 each, $6,000 if 50 or over – but you should let us calculate if you are eligible) – if you go on extension and want to do an IRA, you must do it by April 15th. If you end up on extension we will not be able to remind you.

	Regular	Roth	Already Paid
Taxpayer:	$_______	$________	$_______
Spouse:	$_______	$________	$_______

Did you convert to a Roth IRA? Yes ____ NO ___

Alimony Paid or Received: $________

Did you adopt a child in 2008? If yes, you may qualify for a tax credit.

Did you pay any student loan interest? If yes, provide the form from the reporting institution.

If you are a teacher, did you spend your own money for classroom supplies? If yes, how much did you spend $_________.

Did any family member attend college in 2008? If yes, send us the Form 1098-T

MA RESIDENTS MUST COMPLETE – IF LEFT BLANK, WILL ASSUME "N/A" and you will lose your MA deduction:

Name of Health Ins Provider _____________

Tax ID # of Provider _______________

Policy # ____________________

If husband and wife, must have info for both of you.

If you have 1099-HC, just send that to us and no need to fill out this section

Massachusetts USE TAX: How much did you spend out of state for products you brought back into the state and did not pay a sales tax at the time of purchase?

Amount: $________ (If left blank, we will assume $0)

Energy saving improvements (windows, insulation, new furnace) paid in 2008 $______

Deductions:

(ANY ITEMS LEFT BLANK WILL BE CONSIDERED TO BE $0 IN AMOUNT)

Medical Expenses:

Prescription Medicine/Drugs ....$_________

Doctor, dental, medical bills ………..$_________

Hospitals and Nursing Homes) ....$_________

Health/Dental Insurance paid .... $_________

Long term care insurance paid ....$_________

Medicare premiums (Form SSA-1099) ...$_________

Medical miles driven .... _________

Parking …………………………..$_________

Glasses, hearing aids, etc ....$_________

NOTE – for medical insurance, do not include premiums deducted "pre-tax" from your paycheck. Also, do not include premiums for long term disability insurance.

Taxes Paid:

Real Estate tax - primary home ....$_________

Real Estate tax - vacation home ....$_________

Real Estate tax – undeveloped land .$ _________

Excise tax on cars, boats, trailers .....$_________

Boat registration costs – NH ………$_________

Sales tax you kept track of ……....$_________

Do not include taxes on rental property – separate worksheet for that

Contributions:

Church/Temple ....$_________

Payroll deductions for United Way ...$_________

Other paid by check ....$_________

Goodwill: date ________…….......$_________

Salvation Army: date ________…...$_________

Big Brother Big Sister: date _____...$_________

Epilepsy Foundation : date _____.....$_________

Mileage driven for charity .... _________

Note- no more "cash in basket in church" – must be able to prove charity via any of the following: cancelled check, pledge statement, credit card, receipt

Misc deductions

Union Dues ....$__________

Tax Prep Fees ....$__________

Job seeking costs ....$__________

Safe Deposit Box ....…......$__________

Investment expenses …………$__________

IRA Fees paid by check …….$ __________

Investment Fees …………….$ __________

Gambling Losses …………..$ ___________

Employee Job Costs:

If you are self-employed do not fill in this section – you have a separate organizer for that. Do not include any expenses that your employer reimbursed you for.

Professional license/dues ...$__________

Job related education ……..$__________

Trade journals/dues ....$__________

Work tools ....$__________

Business phone ....$__________

Business meals ....$__________

Travel (hotel/airfare) ....$__________

Taxis/parking on trips ....$__________

# of Overnights if a pilot .. ..$__________

Uniforms/Cleaning ....$__________

Office supplies ……..............$__________

Work related legal fees …....$_________

NOTE – for deductible vehicle mileage and expenses, please complete that organizer

Interest Deductions:

We need to see a copy or the original Form 1098 from each mortgage company / bank

Refinance In 2008?:

Bring/mail HUD settlement sheet. How many years is new mortgage – enter here ----> ______

If the number of years is left blank, we will assume 30 yrs

MA Circuit Breaker Credit (if 65 or older):

Your age _______

Spouse's age _______

Assessed value of home $_____________

(if you don't know, call city/town hall)

Total property tax paid in 2008 $_________

If rent, total rent paid in 2008 $__________

Water/sewer bills paid in 2008 $___________

MA Rent Deduction – if you rent rather than own your home?

Landlord's name ________________

Landlord's street address _______________

Landlord's city and zip _________________

Date range you rented, or "all year" ______________

Total rent paid in 2008 $_____________

Forget anything?

IMPORTANT: Put a check mark next to each item below so you know you considered the item, and if applicable, you have it ready for us:

- **Social security number for new dependents**
- **Did you provide more than ½ support for your unemployed adult child (qualifies as a dependent)**
- **Do you support any parents that have no income other than social security?**
- **Any HUD sheets for sale of property**
- **Any HUD sheets for purchase of property**
- **Any HUD sheets for refinancing**
- **Copy of your 2007 tax returns if you are a new client**

- **Did your kids go to summer camp (day camp, not overnight)? If so, might be a day care deduction. See above item.**
- **Unemployment income**
- **Tuition and fee payments and year of school for family members**
- **If you are 70 ½ or older, did you get your minimum distribution from your IRA**
- **Interest and dividend/brokerage forms for your child (might need a tax return… see below)**
- **Did you buy a hybrid car?**
- **Did you buy a principal residence between 4/9/08 – 7/1/09 and did not own a principal residence for the 36 months prior to the date of purchase?**
- **Mass Use Tax out of state purchases**
- **Even if you don't typically itemize your deductions, we do need your real estate tax paid in 2008 – new deduction**
- **Do you have any foreign bank accounts or investments (if yes, we must report)**

Your Kid's Tax Returns:

How do you know if your child needs to file a tax return? Follow this rule:

Bring all the W-2's and 1099's that pertain to your child (the forms will have the child's social security number) to our office and we will let you know!

NOTE – if you do your kids' returns yourself be sure you understand the new kiddie tax rules

Please make a list of all your bank accounts and investment accounts and be sure you have all your 1099's.

Bring/mail the 1099's from those institutions. **If we don't see a 1099 from a bank or mutual fund that you reported on the prior year tax return, we will assume you no longer have that account or that account did not pay enough income to issue a 1099.** Remember, missing 1099's will trigger a letter from the IRS – if we have to draft a letter on your behalf we have to charge for that. So take the time to check all sources of income.

Sending your Organizers via email –

This past year we had several clients scan/email their W-2's, 1099's and Organizers to us. It was easy to read, no lost mail, and with limited appointments, it was very convenient for those clients.

We like this method. As you know, more and more communication is being done electronically, and that includes sending your tax info to your CPA.

Organizer #2 should also be used to assist you in organizing your 1099 and W-2 income.