

Willington Financial PC, CPAs
Seven Main Street
Stafford Springs, CT 06076-1453

The 2009 Tax Organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2009 income tax return. Please complete the organizer sections as appropriate and provide supporting documentation where necessary. Prior year data is included on the organizer sections for your reference.

Please provide us with the following additional information:

- A copy of your 2008 tax return, if not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities

The organizer is optional. If you feel a document gives all the necessary information (1099, etc), feel free to just include it. Please do, however, try to answer the series of yes/no questions.

Thank you for your help in the completion of the Tax Organizer. Please contact us if you need further assistance.

Sincerely,

Mark Makuch, CPA, CFE

I (we) have submitted this information for the sole purpose of preparing my (our) tax return. Each item can be substantiated by receipts, cancelled checks, or other documents. This information is true, correct and complete to the best of my (our) knowledge.

If applicable, both taxpayer and spouse should sign.

Accepted by: _____

Taxpayer's signature

Date

Spouse's signature

Date