

2008	1040	US	Tax Organizer
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**Wilmington Financial PC, CPAs**  
**Seven Main Street**  
**Stafford Springs, CT 06076-1453**  
 Telephone number: **(860) 684-4470**  
 Fax number: **(860) 684-3846**  
 E-mail address:

**Tax Return Appointment**

Date:  
 Time:  
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2008 tax return. Please enter all pertinent 2008 information.

**CLIENT INFORMATION**

		Taxpayer	Spouse
First name and initial . . .			
Last name . . . . .			
Title/suffix . . . . .			
Social security number . .			
Occupation . . . . .			
Date of birth (m/d/y) . . . .			
Date of death (m/d/y) . . . .			
1=blind . . . . .			
Home phone . . . . .			
Work phone . . . . .			
Work extension . . . . .			
Cell phone . . . . .			
E-mail address . . . . .			
Address	In care of . . . . .		
	Street address . . . . .		
	Apartment number . . . . .		
	City . . . . .		
	State . . . . .		
	ZIP code . . . . .		

**DEPENDENTS**

		Dependent No.	Dependent No.
First name . . . . .			
Last name . . . . .			
Title/suffix . . . . .			
Date of birth (m/d/y) . . . .			
Social security number . .			
Relationship . . . . .			
Months lived at home . . . .			
		Dependent No.	Dependent No.
First name . . . . .			
Last name . . . . .			
Title/suffix . . . . .			
Date of birth (m/d/y) . . . .			
Social security number . .			
Relationship . . . . .			
Months lived at home . . . .			

**2008** | **1040** | **US** | **Tax Organizer**

Please enter all pertinent 2008 information. If you have attached a government form for an item, check the box and do not enter a 2008 amount.

**WAGES, SALARIES AND TIPS**

Employer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2008 Amount	2007 Amount
Attach Forms W-2	_____
	_____
	_____
	_____

**INTEREST INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-INT	_____
	_____
	_____
	_____

**DIVIDEND INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-DIV	_____
	_____
	_____
	_____

**PENSIONS, IRA AND GAMBLING INCOME**

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-R & W-2G	_____
	_____
	_____
	_____
Winnings not reported on W-2G.....	_____
Total gambling losses.....	_____

**OTHER GOVERNMENT FORMS - INCOME**

<input type="checkbox"/>	Form 1099-B - Sales of stock (also include transaction history).....
<input type="checkbox"/>	Form 1099-MISC - Miscellaneous income.....
<input type="checkbox"/>	Form 1099-S - Sales of real estate (also include closing statements).....
<input type="checkbox"/>	Form 1099-G - State tax refunds.....

Attach Forms 1099	
Attach Forms 1099	_____

Taxpayer:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....

Attach Forms 1099	_____
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Spouse:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....

Attach Forms 1099	_____
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**MISCELLANEOUS INCOME**

Taxpayer: Alimony received.....	_____
Spouse: Alimony received.....	_____
Other: _____	_____

_____	_____
_____	_____
_____	_____

**RETIREMENT PLAN CONTRIBUTIONS**

Taxpayer: Traditional IRA contributions (1=maximum).....  
 Roth IRA contributions (1=maximum).....  
 Self-employed health insurance premiums.....  
 Spouse: Traditional IRA contributions (1=maximum).....  
 Roth IRA contributions (1=maximum).....  
 Self-employed health insurance premiums.....

2008 Amount	2007 Amount

**OTHER GOVERNMENT FORMS - DEDUCTIONS**

Form 1098-E - Student loan interest.....  
 Form 1098-T - Tuition and related expenses.....

Attach Forms 1098	
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**ADJUSTMENTS TO INCOME**

Taxpayer:  
 Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum).....  
 Educator expenses.....  
 Expenses from rental of personal property.....  
 Other adjustments to income:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Alimony paid - Recipient name & SSN.....  
 \_\_\_\_\_  
 \_\_\_\_\_


Spouse:  
 Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum).....  
 Educator expenses.....  
 Expenses from rental of personal property.....  
 Other adjustments to income:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Alimony paid - Recipient name & SSN.....  
 \_\_\_\_\_  
 \_\_\_\_\_


**MEDICAL AND DENTAL EXPENSES**

Prescription medicines and drugs.....  
 Doctors, dentists and nurses.....  
 Hospitals and nursing homes.....  
 Insurance premiums.....  
 Long-term care premiums - taxpayer.....  
 Long-term care premiums - spouse.....  
 Insurance reimbursement.....  
 Out-of-pocket lodging and transportation expenses.....  
 Number of medical miles (1/1/08 - 6/30/08).....  
 Number of medical miles (7/1/08 - 12/31/08).....  
 Other: \_\_\_\_\_  
 \_\_\_\_\_


**TAXES PAID**

State income taxes - 1/08 payment on 2007 state estimate.....  
 State income taxes - paid with 2007 state extension.....  
 State income taxes - paid with 2007 state return.....  
 State income taxes - paid for prior years and/or to other states.....


2008	1040	US	Tax Organizer
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**TAXES PAID (continued)**

City/local income taxes - 1/08 payment on 2007 city/local estimate.....  
 City/local income taxes - paid with 2007 city/local extension.....  
 City/local income taxes - paid with 2007 city/local return.....  
 State and local sales taxes.....  
 Sales taxes paid on vehicles, boats, and aircraft.....  
 Use taxes paid on 2008 purchases.....  
 Use taxes paid on 2007 state return.....  
 Real estate taxes - principal residence.....  
 Real estate taxes - property held for investment.....  
 Foreign income taxes.....

2008 Amount	2007 Amount

Personal property taxes (including automobile fees in some states)...

<b>Attach Tax Notice</b>	
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**INTEREST PAID**

Home mortgage interest and points paid:

\_\_\_\_\_  
 \_\_\_\_\_

<b>Attach Forms 1098</b>	
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Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):

\_\_\_\_\_  
 \_\_\_\_\_


Points not reported on Form 1098:

\_\_\_\_\_  
 \_\_\_\_\_


Mortgage insurance premiums on post 12/31/06 contracts.....

Investment interest (interest on margin accounts):

\_\_\_\_\_  
 \_\_\_\_\_


Passive interest.....

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**CASH CONTRIBUTIONS**

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

\_\_\_\_\_  
 \_\_\_\_\_


Volunteer expenses (out-of-pocket).....

Number of charitable miles.....


**NONCASH CONTRIBUTIONS**

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

\_\_\_\_\_  
 \_\_\_\_\_


**MISCELLANEOUS DEDUCTIONS**

Union and professional dues.....

Tax return preparation fee.....

Safe deposit box rental.....

Investment expenses.....

Estate tax, section 691(c).....

Unreimbursed employee expenses:

\_\_\_\_\_  
 \_\_\_\_\_


Other: \_\_\_\_\_


2008

1040

US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2008, please check the appropriate box and provide additional information if necessary.

YES

NO



Did your marital status change during the year?



Did your address change during the year?



Could you be claimed as a dependent on another person's tax return?



Were there any changes in dependents?



Did you receive unreported tip income of \$20 or more in any month?



Did you receive any disability income?



Did you buy or sell any stocks, bonds or other investment property?



Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?



Did you purchase a new hybrid vehicle in 2008?



Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?



Did you transfer or rollover any amount from one retirement plan to another?



Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?



Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?



Did you incur a loss because of damaged or stolen property?



Did you use your car on the job (other than to and from work)?



Do you want to electronically file your tax return?



May the IRS discuss your tax return with your preparer?



Was your home rented out or used for business?



Were you notified or audited by either the IRS or the State taxing agency?



Did you receive the Economic Stimulus Payment (rebate) in 2008?

2008

1040

US

Business Income (Schedule C)

No.

16

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Principal business/profession .....	
Principal business code .....	
Business name, if different from Form 1040 .....	
Business address, if different from Form 1040 .....	
City, state, ZIP code, if different from Form 1040 .....	
Employer identification number .....	
Other accounting method .....	

Accounting method: 1=cash, 2=accrual .....		
Inventory method: 1=cost, 2=lower c/m, 3=other .....		
1=change of inventory method .....		
1=spouse, 2=joint .....		
1=first Schedule C filed for this business .....		
1=W-2 earnings as statutory employee .....		
1=not subject to self-employment tax .....		
1=did not "materially participate" .....		
1=personal services is not a material income producing factor .....		
1=investment .....		
1=minister's Schedule C .....		
1=single member limited liability company .....		

INCOME

	2008 Amount	2007 Amount
Gross receipts or sales (Form 1099-MISC, box 7) .....		
Returns and allowances .....		
Other income:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		

COST OF GOODS SOLD

Inventory at beginning of the year .....		
Purchases .....		
Cost of items for personal use .....		
Cost of labor .....		
Materials and supplies .....		
Other costs:		
_____		
_____		
_____		
_____		
_____		
_____		
Inventory at end of the year .....		

2008

1040

US

Business Income (Schedule C) (cont.)

No.

16 p2

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

EXPENSES

	2008 Amount	2007 Amount
Accounting.....		
Advertising.....		
Answering service.....		
Bad debts from sales or service.....		
Bank charges.....		
Car and truck expenses (not entered elsewhere).....		
Commissions.....		
Contract labor.....		
Delivery and freight.....		
Dues and subscriptions.....		
Employee benefit programs.....		
Insurance (other than health).....		
Mortgage interest (paid to banks, etc.).....		
Other interest (not entered elsewhere).....		
Janitorial.....		
Laundry and cleaning.....		
Legal and professional.....		
Miscellaneous.....		
Office expense.....		
Outside services.....		
Parking and tolls.....		
Pension and profit sharing plans - contributions.....		
Pension and profit sharing plans - admin. and education costs.....		
Postage.....		
Printing.....		
Rent - vehicles, machinery, & equipment (not entered elsewhere).....		
Rent - other.....		
Repairs.....		
Security.....		
Supplies.....		
Taxes - real estate.....		
Taxes - payroll.....		
Taxes - sales tax included in gross receipts.....		
Taxes - other (not entered elsewhere).....		
Telephone.....		
Tools.....		
Travel.....		
Total meals and entertainment in full (50%).....		
Department of Transportation meals in full (75%).....		
Uniforms.....		
Utilities.....		
Wages.....		

Other expenses:

_____		
_____		
_____		
_____		
_____		

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

2008	1040	US	<b>Rental &amp; Royalty Income (Schedule E)</b>	No. <input style="width:30px;" type="text"/>	<b>18</b>
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Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

**GENERAL INFORMATION**

Kind of property.....

Location of property.....

Percentage of ownership if not 100% (.xxxx).....	<input style="width:90%; height:15px;" type="text"/>	
Percentage of tenant occupancy if not 100% (.xxxx).....	<input style="width:90%; height:15px;" type="text"/>	
1=spouse, 2=joint.....	<input style="width:90%; height:15px;" type="text"/>	
1=nonpassive activity, 2=passive royalty.....	<input style="width:90%; height:15px;" type="text"/>	
1=did not actively participate.....	<input style="width:90%; height:15px;" type="text"/>	
1=real estate professional.....	<input style="width:90%; height:15px;" type="text"/>	
1=rental other than real estate.....	<input style="width:90%; height:15px;" type="text"/>	
1=investment.....	<input style="width:90%; height:15px;" type="text"/>	
1=single member limited liability company.....	<input style="width:90%; height:15px;" type="text"/>	

**INCOME**

	2008 Amount	2007 Amount
Rents received (Form 1099-MISC, box 1).....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Royalties received (Form 1099-MISC, box 2).....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>

**DIRECT EXPENSES**

NOTE: Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

Advertising.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Association dues.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Auto and travel (not entered elsewhere).....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Cleaning and maintenance.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Commissions.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Gardening.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Insurance.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Legal and professional fees.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Licenses and permits.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Management fees.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Miscellaneous.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Mortgage interest (paid to banks, etc.).....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Qualified mortgage insurance premiums.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Excess mortgage interest.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Other interest (not entered elsewhere).....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Painting and decorating.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Pest control.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Plumbing and electrical.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Repairs.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Supplies.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Taxes - real estate.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Taxes - other (not entered elsewhere).....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Telephone.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Utilities.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Wages and salaries.....	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
Other:		
_____	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
_____	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
_____	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>
_____	<input style="width:90%; height:15px;" type="text"/>	<input style="width:90%; height:15px;" type="text"/>

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

2008

1040

US

Rental & Royalty Income (Sch. E) (cont.)

No.

18 p2

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.

**OIL AND GAS**

	2008 Amount	2007 Amount
Production type (preparer use only) .....		
Cost depletion .....		
Percentage depletion rate or amount .....		
State cost depletion, if different (-1 if none) .....		
State % depletion rate or amount, if different (-1 if none) .....		

**VACATION HOME**

Number of days rented at fair market value .....		
Number of days personal use .....		
Number of days owned (if optional method elected) .....		

**INDIRECT EXPENSES**

NOTE: Indirect expenses are related to operating or maintaining the dwelling unit. These include repairs, insurance, and utilities.

Advertising .....		
Association dues .....		
Auto and travel (not entered elsewhere) .....		
Cleaning and maintenance .....		
Commissions .....		
Gardening .....		
Insurance .....		
Legal and professional fees .....		
Licenses and permits .....		
Management fees .....		
Miscellaneous .....		
Mortgage interest (paid to banks, etc.) .....		
Qualified mortgage insurance premiums .....		
Excess mortgage interest .....		
Other interest (not entered elsewhere) .....		
Painting and decorating .....		
Pest control .....		
Plumbing and electrical .....		
Repairs .....		
Supplies .....		
Taxes - real estate .....		
Taxes - other (not entered elsewhere) .....		
Telephone .....		
Utilities .....		
Wages and salaries .....		

Other:

_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		