

# Howland Tax Services

## 2007 Personal Tax Organizer (United States)

### Personal Information

You	Your Spouse
Name (with initial)	Name (with initial)
Social Security Number	Social Security Number
Address	Address (if different)
Zip Code	Zip Code
Phone/Fax	Phone/Fax
Email	Email
Occupation	Occupation

### New Clients

You	Your Spouse	
Birth Date	Birth Date	
Preferred Filing Status		
<input type="checkbox"/> Single	<input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Head of Household (with qualifying person)
	<input type="checkbox"/> Married Filing Separately	<input type="checkbox"/> Qualifying Widow(er) with dependant child

New clients please provide a copy of last year's tax return, or the last tax return that was filed.

### All Clients

Did your marital status change during the year?  Yes  No

If yes, indicate date of change. \_\_\_\_\_

Did you live apart from your spouse for the entire year?  Yes  No

Does your spouse itemize deductions on a separate return?  Yes  No

Do you want \$3 to go into the Presidential Election Campaign Fund?  Yes  No  
 (Will not change refund)

Were you or your spouse enrolled as a full-time student during any 5 calendar months during 2007?  
 (The 5 months do not have to be consecutive)  Yes  No

Were you or your spouse legally blind or permanently and totally disabled at any time during 2007?  
 Yes  No

Did you have more than \$10,000 in a foreign bank account at any time during 2007?  
 (If yes, Form TD F 90-22.1 must be filed by June 30, 2008)  Yes  No

If you receive a refund on your 2007 income tax return, do you want to apply that refund to your 2008 tax?  
 Yes  No

Do you want your refund to be direct deposited into your bank account?  
 (If yes, please provide bank routing and account numbers)  Yes  No

Dependant Information			
Name			
Birth Date			
Relationship			
Social Security Num. or ITIN			
Income			
Months Lived With You			
U.S. Citizen or Resident Alien?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Did you pay childcare expenses?  Yes  No

If yes, indicate childcare provider's name, address and tax ID number (SSN or EIN).

_____	_____
_____	_____
_____	_____

Did you pay any educational tuition or fees for you or your dependant?  Yes  No

## Income & Expense Items

### Employment & Other Income

- W-2 forms
- Pensions and annuities
- Retirement plan distribution - Form 1099-R
- Partnership, trust, S-Corp income - Sched. K-1
- Miscellaneous income - Form 1099-MISC
- Alimony received
- Pay for jury duty
- Gambling/lottery winnings
- Prizes or awards
- Scholarships and fellowships
- State and local income tax refunds
- Unemployment compensation - Form 1099-G

### Investment Income

- Interest income - Form 1099-INT or 1099-OID
- Dividend income - Form 1099-DIV
- Capital gains/brokerage transactions - Form 1099-B and confirmation slips

### Homeowners and Renters

- Mortgage interest - Form 1098 and qualified mortgage insurance payments (new)
- Sale of home or other property - Form 1099-S
- Real estate taxes paid
- Rent paid
- Moving expenses

### Cash Gifts

Did you make cash gifts to any one person worth more than \$12,000?

- Yes     No

### Expenses

- Student loan interest paid
- Education expenses
- Auto - personal property tax paid

- Charitable donations - provide bank record, cancelled check or receipt for all amounts (new)
- Unreimbursed job expenses (travel, uniforms, union dues, subscriptions, etc.)
- Job hunting expenses
- Investment expenses
- Childcare expenses
- Alimony paid
- Tax return preparation fees
- Receipts for medical/dental expenses, including premiums to Medicare D (new)
- Casualty/theft losses

### Also Provide...

- Estimated tax payments made for 2007
- IRS or State correspondence and assessment notices
- Mailing labels from IRS or State
- Receipts for IRA, Keogh, and other retirement plan contributions
- Business income and expense documents
- Rental income and expense documents

### Foreign Tax Credit

Did you pay tax to a foreign country for income earned outside the United States? Provide details and a copy of the foreign tax return.

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### Additional Items

Provide details regarding any other income or expenses not listed above.

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