

Howland Tax Services

2009 Personal Tax Organizer (United States)

Personal Information

You	Your Spouse
Name (with middle initial)	Name (with middle 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"/> Married Filing Separately
	<input type="checkbox"/> Head of Household (with qualifying person)
	<input type="checkbox"/> Qualifying Widow(er) with dependant child

New clients: please provide copies of your 2008 US 1040, State, and Local income tax returns (or the last returns that were filed).

Categories

You	Your Spouse
<input type="checkbox"/> United States Citizen	<input type="checkbox"/> United States Citizen
<input type="checkbox"/> Green Card Holder	<input type="checkbox"/> Green Card Holder
<input type="checkbox"/> Resident Alien	<input type="checkbox"/> Resident Alien
<input type="checkbox"/> Non-Resident Alien	<input type="checkbox"/> Non-Resident Alien
<input type="checkbox"/> Live in Canada, Work in U.S. (Commuter)	<input type="checkbox"/> Live in Canada, Work in U.S. (Commuter)
<input type="checkbox"/> I'm Not Sure	<input type="checkbox"/> I'm Not Sure

United States Visa type and date issued (if applicable) _____

Canadian Visa type and date issued (if applicable) _____

Non-Resident Aliens - days present in U.S. during...

2009: _____ 2008: _____ 2007: _____

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 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?
(Will not change refund) Yes No

Were you or your spouse enrolled as a full-time student during 2009? Yes No

Were you or your spouse legally blind or permanently and totally disabled at any time during 2009? Yes 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

Foreign Financial Accounts

Did you have more than \$10,000 in foreign bank or financial accounts at any time during 2009?

(Including RRSPs)?

Yes No

If yes, Form TD F 90-22.1 must be filed with the U.S. Department of the Treasury by June 30, 2010 (received, not postmarked). If you want us to complete this form for you, please provide name and addresses of financial institutions, account numbers and types, and maximum values of each account during 2009 (in US dollars).

Refunds

If you receive a refund on your 2009 income tax return, do you want to apply that refund to your 2010 tax?

Yes No

Do you want your refund to be direct deposited into your bank accounts? Yes No

If yes, you can provide bank routing and account numbers for up to three accounts.

Do you want to use a portion of your refund to buy Series I U.S. Savings Bonds? Yes No

If yes, please indicate preferred amount invested in bonds (must be divisible by 50), and indicate bank routing and account number for deposit of remaining refund.

First-Time Homebuyer Credit

Are you a first-time home buyer? Yes No

Have you owned a principal residence at any time during the three years prior to the date of purchase of your new home? Yes No

Are you a long-time homeowner buying a replacement principal residence? Yes No

Did you own and use the previous home as a principal residence for at least five consecutive years of the eight-year period ending on the date of purchase of the new home? Yes No

Did you purchase the new home before April 30, 2010 (closing the sale before June 30, 2010)? Yes No

If yes, please provide details regarding the purchase of the new home including address, date purchased, purchase price, etc. Also provide details regarding disposition of old home including date sold and gain on sale.

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
- 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 \$13,000?

- Yes No

Expenses & Deductions

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

- Charitable donations - provide bank record, cancelled check or receipt for all amounts
- 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
- Casualty/theft losses

Also Provide...

- Estimated tax payments made for 2009
- 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.

Additional Items

This Personal Tax Organizer is not intended to be a complete list. Please provide details regarding any other income or expenses not listed above.
