BLAIR TAX CONSULTING, P.A. BTC

Tax Organizer – 2009

You MUST complete and return this Organizer to our office before we will compile your tax return!

Taxpayer's Name: ______________________

Spouse's Name: ______________________

Address for Tax Return:

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Telephone Numbers:

Home: ______________________

Cell: ______________________

Please complete the Tax Organizer in its entirety, and include it with all copies of your W-2's, 1099's, etc.

We suggest that you either scan or make copies of all income statements (W-2/1099's) before mailing originals.

We can not compile your tax return without a completed Tax Organizer. There are no exceptions to this policy. Incomplete Organizers will be returned to you for completion.

	Taxpayer	Spouse
Social Security Number:		
Occupation:		
Date Of Birth:		

Children and other Dependents: (If you need more room, please use back.)

	1	2	3	4
Full Name:				
Date of Birth:				
Social Security Number:				
Relationship:				

Income: Please list and attach all income Forms (W-2 and 1099) from your job, business or pension.

Source	Amount	Source	Amount

If you need more room, please use back.

Interests and Dividend Income. Please list and attach all Forms 1099 for interest and dividends.

Source	Amount	Source	Amount

Alimony received: $ ______________ Unemployment compensation: $ ______________

Disability income: $ ______________ Lottery & Gambling winnings: $ ______________

Adjustments to income:

Alimony paid or received (Not child support): Circle whether paid or received.

To whom paid to or received from: ______________ Social Security Number: ______________

Contributions to individual retirement accounts:

Taxpayer's IRA: $ ______________ Spouse's IRA: $ ______________

Taxpayer's SEP: $ ______________ Spouse's SEP: $ ______________

Itemized Deductions:

Taxes: Amount

Real Estate Taxes: ______________

Personal Property Taxes: ______________

Interest paid: (Attach Form 1098)

Home Mortgage to financial institutions: ______________

Home Mortgage paid to individuals: ______________

To whom paid: ______________ Social Security Number: ______________

Address: ______________

Contributions: (If not already reported to Blair Tax Consulting) Amount

Church / Temple ______________

Other cash contributions (Cancer fund, heart association, etc.): ______________

Non-Cash Donations (Include receipt): ______________

Gambling/lottery losses (If you had no winnings, you can not deduct gambling losses): ______________

Please answer the following questions :

Are you incorporated? ..... Yes [ ] No [ ]

Where there any births, deaths, adoptions, marriages, or divorces in your immediate family during the year? ..... Yes [ ] No [ ]

Did you sell or purchase any real estate during the year? If yes, please include the closing statement and form 1099S. ..... Yes [ ] No [ ]

Did you sell any stocks, bonds, or other property during the year? If yes, include Form 1099B statement from your broker. ..... Yes [ ] No [ ]

Did you pay for the care of one or more persons to enable you to work during the year? (Daycare.) If "yes", please call BTC for details. ..... Yes [ ] No [ ]

Did you move because of a job change? (Company Drivers only.) ..... Yes [ ] No [ ]

Did you make any federal estimated tax payments for 2009?

Payment Date	Amount	Payment Date	Amount

Delivery method for tax package:

[ ] Please mail my tax package via the United States Postal Service (USPS).

[ ] Please E-Mail my tax package saving me a week or more of waiting. **(See note below.)**

My E-Mail address is: ______________________________

NOTE: If you choose to have your tax package e-mailed, it will be sent immediately upon completion along with all of the necessary mailing addresses and instructions. Simply print it, sign it, and drop it in the mail. Before selecting this delivery method, be certain that your e-mail address is current and usable, and your printer is capable of quality printing.

Only one delivery method should be checked as we are not permitted to both e-mail AND send a copy via the USPS, or for example, e-mail the Federal return and send the State return via USPS. The same delivery method will apply to both returns.

Your federal tax return will be electronically signed, but due to programming limitations, we will not be able to sign your State return. This is of no consequence. Regardless of the lack of signature, we stand behind our work.

THE INFORMATION CONTAINED HEREIN IS, TO THE BEST OF MY KNOWLEDGE, CORRECT AND COMPLETE. I UNDERSTAND THAT BLAIR TAX CONSULTING WILL NOT COMPILE MY TAX RETURN UNTIL THIS FORM IS COMPLETED, SIGNED, AND RETURN WITH ALL MY INCOME STATEMENTS. *THERE ARE NO EXCEPTIONS TO THIS POLICY.*

______________________________ ______________

Signature Date