

## Tax Organizer – 2010

*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:

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

**Telephone Numbers:**

Home: \_\_\_\_\_

Cell: \_\_\_\_\_

Please complete the Tax Organizer in its entirety, and include it with 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.

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**Filing Method:**

Single [ ] Married Filing Jointly [ ] Married Filing Separate [ ] Head Of Household [ ]

	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: \$ \_\_\_\_\_

**Gambling/lottery** losses (If you had no winnings, you may not deduct gambling losses): \_\_\_\_\_

**Adjustments to income:**

Alimony paid or received (Not child support): Indicate 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: _____	

<b>Contributions:</b> (If not already reported to Blair Tax Consulting)	Amount
Church / Temple .....	_____
Other cash contributions (Cancer fund, heart association, etc.): .....	_____
_____	_____
_____	_____
Non-Cash Donations (Include receipt): .....	_____

**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 suffer any loss from the use of Chinese Drywall. ....	Yes [ ]	No [ ]

**Did you make any federal or State estimated tax payments for 2010? (Please note which is Federal and which is State.)**

Federal or State	Amount	Federal or State	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