## Tax Organizer For 2008 Income Tax Return

Prepared For:			
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## **Prepared By:**

Marcia Queen Financial Support S PO Box 950 Gilroy, CA 95020

This Tax Organizer can be used to help identify the information needed to prepare your 2008 income tax return. Enter your 2008 information and if you need additional space, enclose a separate sheet with the details. If available, your prior year information has been included for you to use as a reference. You do not need to make 2007 entries.

Please return this organizer along with all Form W-2's, 1099's, and any other information you feel will assist with the preparation of your 2008 income tax return.

If you have any questions, please feel free to contact me at (408)848-5645.

PERSONAL INFORMAT										
Taxpayer's name			Socia	al Security Nu						
Spouse's name		Socia	Social Security Number							
Home Address										
City or town		State	Zip Code		County					
l elephone #1	_	Telephone #2								
E-mail Address										
I Chausa	th Occupation		Blind	Disabled	Date of Death					
FILING STATUS										
Indicate your filing status to be used on your 2008 income tax return:    X   Single										
OTHER INFORMATION										
Taxpayer - Yes Do you want to allow the Do you wish to electron Direct Deposit Informati Name of Financial I	te \$3 to the Presidential EI  No Sp e paid preparer to discuss ically file your return? Y ion (attach proof of deposit	ouse - Yes  your return with the Yes  No  t)	No □ e IRS? Y Checking Ac	es □ N	Savings Account					
DEPENDENTS										
Enter the following d	lependent information for a	any qualifying child	l or qualifying r	elative:						
First Name	Last Name	SSN	Relationship	Date of birth	# of months   Child care   expenses p   in 2008	paid				
	+									

MIS	SCELLANEOUS QUESTIONS omplete the following questions. If your answer to any question below is Yes, enclose supporting documents.	mentation. Yes	No
			<u> </u>
1.	Did you receive any notices or correspondence from the IRS or state agency during 2008?		
2.	Did you earn any foreign income or have any foreign taxes paid during 2008?		
3.	Did you pay a household employee cash wages of \$1,600 or more during 2008?		
4.	Are you a first-time homebuyer who purchased (or will purchase) a home after April 8, 2008 and before July 1, 2009?		
5.	Did you refinance a mortgage during 2008?		
6.	Did you pay any real estate taxes in 2008?		
7.	Did you sell your home during 2008?		
8.	Did you use any special fuels for farming purposes or other non-highway uses?		
9.	Did you receive any unreported tip income during 2008?		
10.	Do you have any children age 18 or under (or student under age 24) who had investment income of more than \$1,800?		
11.	If any of your children are required to file a return, do you elect to report your child's interest and dividends on your return?		
12.	Did you pay any expenses related to the adoption of an eligible child?		
13.	Did you purchase a qualified hybrid or alternative fuel motor vehicle during 2008?		
14.	Did you receive any distributions from a health savings account (HSA), Archer MSA, or Medicare Advantage (MA) MSA reported to you on Form 1099-SA?		
15.	Did you receive an economic stimulus payment in 2008?		
16.	Did you provide housing for a person displaced by a Midwestern disaster, make qualified contributions or use your vehicle for volunteer work related to a Midwestern disaster, or were you directly affected by a Midwestern disaster?		
AD	DITIONAL COMMENTS OR QUESTIONS		

W	WAGES AND SALARIES (Please enclose all copies of 2008 Form W-2)									
	2008									
	T = 1	Taxpayer S = Spouse	Box 1	Box 2	Box 17	2007				
	  TS	Employer's Name	<ul><li>Wages and salaries</li></ul>	Federal income tax withheld	State income tax withheld	Taxable wages				

DIVIDEND INCOME	(Please enclose all copies	of 2008 Form 1099-DIV)
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## Special Codes:

 $\vec{F}$  = Federal tax-exempt only B = Federal and state tax-exempt only

S = State tax-exempt only N = Nominee income

T = Taxpayer S = Spouse J = Joi	nt			2008					
			Box 1a	Box 1b	Box 2a	Box 4	Dividends and		
TSJ Payer's Name	Sp	ecial odes	Ordinary dividends	Qualified dividends	Capital gain distributions	Federal income tax withheld	Dividends and capital gain distributions		
	_								
	_								
	+				1				
	$\perp$								
	+				-				
	+				1				
	$\perp$								
	_								
	+				+				
	+								
	$\perp$								
	+								

Special Codes:						
	Accru	ied intere	st paid on acquisition	between payment dates		
			amortizable bond pren			
			I mortgage interest (in	clude SSN and address)		
P = Portion of U.S. savings bonds reported in pr	evious	years				
T		_		0000		0007
= Taxpayer S = Spouse J = Joir	nτ		Box 1	<b>2008</b> Box 3	Box 4	2007
	- Cn		Interest	U.S. savings	Federal income	Taxable
S J Payer's Name	CO	oecial odes	income	bonds	tax withheld	Interest
	$\perp$					
	+					
	+					
	+	+				
	+					
	_					
	_					
	-					
	_					
EREST INCOME - FORM 1099-OID	<b>)</b> (PI	lease er	close all copies of	2008 Form 1099-OI	D)	
pecial Codes:						
S = State tax-exempt only N = Nominee interest		<del></del>				
v = rvorimiee interest						
= Taxpayer S = Spouse J = Joir	nt			2008		2007
			Box 1	Box 2	Box 4	2001
11	Π.					
S J Payer's Name	;	Special codes	Original issue discount	Other periodic interest	Federal income tax withheld	Taxable amou
- Contraction		50005	discount	Intorost	LUX WILLINGIA	Taxable alliot

RA, PENSION, AND ANNUITIES (Please	e enclose al	l copies of 2008	8 Form	า 1099-R)				
T = Taxpayer S = Spouse	Γ			0000				2007
= Taxpayer 5 = Spouse	_	Box 1		<b>2008</b> Box 4				2007
T S Payer's Name	Check if IRA	Gross distribution		ederal income tax withheld	Amour Regular IF	- 1	d over into: Roth IRA	Gross distribution
1 d Tayor o Hamo	IIIIA	distribution		tax withheid	riegulai ii		NO(III IN F	distribution
						_		
Total IRA basis for 2007 and prior ye	ars			Taxpayer				Spouse
Value of all traditional IRA's as of De		, 2008						
ANNUITIES AND PENSIONS BY	(5)				4000 D)			
THE RAILROAD RETIREMENT BOARD	(Please e	nclose all copie	es of 2					
T = Taxpayer S = Spouse				Box 7	2008	3ox 9	1	2007
				Total gross			ncome	Total gross
T S Payer's Name				paid		x with		Total gross paid
PAYMENTS FROM QUALIFIED EDUCA	TION PRO	OGRAMS (Ple	ase er	nclose all copies	of 2008	Form	1099-Q)	
					2008			2007
T = Taxpayer S = Spouse				Box 1		Bo	x 5	
T S Payer's Name			Gro	oss distributions	Private	State	Coverdell	Gross distributions
PARTNERSHIPS, S CORPORATIONS,	ESTATES	AND TRUST	S (P	Please enclose a	I conies	of 200	08 Sched	ule K-1)
Schedule K-1 (1065) Partnerships: Partnership's name	ID Nu	ımber	Partr	nership's name			1	ID Number
				•				
Schedule K-1 (1120S) S Corporations:								
Corporation's name	ID Nu	ımber	Corp	oration's name	)			ID Number
Schedule K-1 (1041) Estates or Trusts:	ID Nu	ımber	Nom	e of Trust or E	etate		1	ID Number
Name of Trust or Estate	ואו טו	iiiibei	ivain	e or trust of E	sial <del>U</del>			ID INUITIDE

BUSINESS INCOME AND EXP	ENSES					
Indicate the owner of this busine Business Name:	ess: 🗌 Tax	payer	☐ Spouse ☐ Joir	nt		
Business product or service:						
Business Address:						
City, State, and Zip Code:						
Did you start or acquire this bus	iness durina 20	008?	□ No			
Accounting Method:		☐ Cash	<b>—</b>		Other (d	describe)
Method used to value inventory		☐ Cost	- <b>-</b>	arket		
Income and Cost of Goods So	old			200	8 Amount	2007 Amount
Gross receipts or sales	· · · · · · · · · ·					2001 741104111
Returns and allowances	. <b></b> .					
Other income (enclose descrip	otion)					
Inventory at beginning of year						
Purchases less cost of items v						
Cost of labor · · · · · · · · ·						
Materials and supplies · · · ·						
Other costs · · · · · · · · · ·	. <b></b> .					
Inventory at end of year · · ·						
					Į.	
Expenses	2008 Amount	2007 Amount			2008 Amou	nt 2007 Amount
Advertising			Taxes and licenses			
Commissions and fees · · · ·			Travel			
Contract labor			Meals and entertainme	nt · ·		
Depletion			Utilities			
Employee benefits			Wages · · · · · · · ·			
Insurance (other than health)			Other:			
Mortgage interest · · · · · ·						
Other interest						
Legal and professional fees						
Office expenses · · · · · · ·						
Pension and profit sharing						
Rent - Vehicle, machinery						
Rent - Other						
Repairs and maintenance						
Supplies						
Vahiala Information						
Vehicle Information		Data al	and in convice		Cost or h	nacio
Rusinoss milos	Com	Date pi	aced in Service	Othor	COSLOLI	Jasis
Vehicle description Business miles Actual expenses such as gas,	oil ropairs of	iniumig iiiies	Parking foos	Other	miles	
Actual expenses such as gas,	on, repairs, etc	,	Faiking lees	and it	JIIS	
Sales, Purchases, and Dispos (New clients, enclose detailed listing of all c	ition of Asset lepreciable assets.)	s in 2008				
Asset description		Date a	acquired Purchase price		Date sold	Sales Price
				_		
		I	L			
Business Use of Home						
Area used exclusively for busing	ness	Total area of	home			
Was the home used as a day of	care facility?	☐ Yes	No Date home	place	d in service	
Casualty losses	Insura	nce	_		of home	
Mortgage interest	Repair	rs and mainter	nance		ie of land	
Real estate taxes paid	Utilitie	s and other ex	penses			

FARM INCOME AND EXPENS	ES									
Indicate the owner of this farm:	□ Tax	paver $\square$	Spouse	e 🔲 Joir	nt					
Principal product	rax	payo	Ороско							
Accounting Method:				☐ Cash		Accrual				
Did you materially participate in	the operation of	of this farm dur	ina 2008			□ No				
. , , , , ,										
Income					2008	Amount	2007Amount			
Sales of livestock and other it	ems bought for	resale								
Cost of livestock and other ite										
Sales of livestock, produce, gr										
Cooperative distributions										
Agricultural program payments · · · · · · · · · · · · · · · · · · ·										
Commodity Credit Corporation										
Commodity Credit Corporation										
Crop insurance proceeds and Custom hire										
Other income										
Inventory of livestock, produce										
Cost of livestock, produce, etc	_	• • •		• •						
Inventory of livestock, produce										
				- 1,			1			
Expenses	2008 Amount	2007 Amount	ъ.			2008 Amount	2007 Amount			
Chemicals				s and maintenar			1			
Conservation · · · · · · · · · · · · · · · · · · ·				and plants purch			+			
Employee benefits				e and warehous						
Feed purchased				es purchased · ·						
Fertilizers and lime				s			+			
Freight and trucking · · · · ·				nary and breedir						
Gasoline, fuel, and oil										
Insurance			Othor							
Mortgage interest · · · · · ·										
Other interest										
Labor hired · · · · · · · · ·										
Pension and profit-sharing										
Vehicles and machinery rent										
Other rentals										
Vehicle Information							1			
		Date nla	ced in s	ervice		Cost or ba	sis			
Business miles	Com	Date pla muting miles	000 111 0	CIVIOC	Other	occi oi bo	.010			
Vehicle description  Business miles  Actual expenses such as gas,	oil. repairs. etc			Parking fees	and to	olls				
	· ·									
Sales, Purchases, and Dispo	eition of Acco	ate in 2002								
(New clients, enclose detailed listing of all de		7.5 III 2000								
Asset description		Date ad	cauired	Purchase price	.   [	Date sold	Sales price			
- 10000 0000 pu							<u> </u>			
					_					

ndicate the owner of this property:	☐ Taxpayer	☐ Spouse	g Join	nt	
Description of property					
Location of property	-				
Did you or your family use this prope	erty during the tax	vear for perso	nal purposes fo	r more	
than the greater of: (a) 14 days, or					s 🗆 No
Did you meet the Active Participatio	` '	-		•	
(To meet these requirements, you must have	•				
others to provide services in a significant and new tenants, deciding on rental terms, approwas this property fully disposed of control of the services in a significant and new tenants, deciding on rental terms, approvided the services in a significant and new tenants, deciding on rental terms, approvided the services in a significant and new tenants.	I bona fide sense. Sucl ving repair expenditures	h management dec	isions include appro	ving ☐ Ye ☐ Ye	
ncome				2008 Amount	2007 Amour
Rents received					
Royalties received					
xpenses				2008 Amount	2007 Amount
Advertising					
Cleaning and maintenance.					
Commissions					
Insurance					
Legal and other professional fees					
Management fees					
Mortgage interest paid to banks					
Other interest					
Repairs					
Supplies					
Taxes					
Utilities					
Other					
/ehicle Information		ete pleand in a	omico.	Contax	hasia
	D:	ate placed in s	ervice	Cost or	basis
	Commuting n	ate placed in s	ervice	Cost or Other miles	basis
Vehicle description Business miles Actual expenses such as gas, oil, i	Dommuting noting notice the pairs, etc_	ate placed in s	erviceParking fees	Cost or Other miles and tolls	basis_
	Date of the control o	ate placed in s	ervice Parking fees	Cost or Other miles and tolls	basis
Vehicle description  Business miles  Actual expenses such as gas, oil, i	Dommuting nepairs, etc	ate placed in s niles	ervice Parking fees	Cost or Other miles and tolls	basis
Vehicle description Business miles Actual expenses such as gas, oil, I Travel expenses			ervice Parking fees	Cost or Other miles and tolls	basis
Vehicle description Business miles Actual expenses such as gas, oil, I Travel expenses  Sales, Purchases, and Disposition	of Assets in 2008		ervice Parking fees	Cost or Other miles and tolls	basis
Vehicle description Business miles Actual expenses such as gas, oil, i	of Assets in 2008				basis
Vehicle description  Business miles  Actual expenses such as gas, oil, in the such as gas, oil,	of Assets in 2008	3			
Vehicle description  Business miles  Actual expenses such as gas, oil, in the such as gas, oil,	of Assets in 2008	3			
Vehicle description  Business miles  Actual expenses such as gas, oil, in the such as gas, oil,	of Assets in 2008	3			
Vehicle description  Business miles  Actual expenses such as gas, oil, in the such as gas, oil,	of Assets in 2008	3			
Vehicle description  Business miles  Actual expenses such as gas, oil, in the such as gas, oil,	of Assets in 2008	3			

FARM RENTAL INCOME AND	EXPENSES							
Indicate the owner of this farm	rental:	] Taxpayer	☐ Sp	ouse	☐ Joii	nt		
Property description:								
Did you actively participate in the	ne operation of	this farm renta	al during :	2008?	Yes	П По		
Did you don't only participate in the	io oporation of	ino ranni rona	a. aamig .		. 00			
					1			
Income	December 15 mans				2008	3 Amount	2	007 Amount
Income from the production of Total cooperative distributions								
Agricultural program payments					-			
Commodity Credit Corporation					-			
Commodity Credit Corporation								
Crop insurance proceeds and								
Other income	•	• •						
							!	
			_					
Expenses	2008 Amount	2007 Amount	-			2008 Amou	ınt	2007 Amount
Chemicals				s and maintena			_	
Conservation				and plants purc			_	
Custom hire				e and warehous			_	
Employee benefits Feed purchased				es purchased .				
Fertilizers and lime			-				_	
Freight and trucking			-	S				
Gasoline, fuel, and oil				ary and breedir			_	
Insurance							_	
Mortgage interest			1					
Other interest			1					
Labor hired			1					
Pension and profit-sharing			1					
Vehicles and machinery rent			1					
Other rentals			1					
		•					•	
Vehicle Information		Data al				Cook out	l:	_
Venicle description	Com	Date pi	aced in se	ervice	Othe	Cost or l	bası	s
Vehicle description  Business miles  Actual expenses such as gas,	oil repairs etc	inuting miles		Parking fee	Ollie ac and	tolle		
Actual expenses such as gas,	on, repairs, etc			raiking let	55 anu			
Sales, Purchases, and Dispos	ition of Asset	s in 2008						
(New clients, enclose detailed listing of all c								
Asset description		Date a	acquired	Purchase price	e C	ate sold		Sales price
					-			

	xpayer S = Spouse J = Joint	opies of 2008 Form 109	9-B or similar sta	tements)	
TSJ	Description and number of shares	Date acquired	Date sold	Cost or other basis	Sales proceeds
$\rightarrow$					
	INCOME			2008	2007
	income Ind local tax refunds (enclose Form 1099-G)			Amount	Amount
			<del>-</del>		
	y received				
	security benefits (enclose Form SSA-1099)				
	ncome such as gambling winnings, jury dut				
	ide description and any supporting docume				
(IIIOIG	de description and any supporting decame	ntation) · · · · · · · ·		L	
THFR	ADJUSTMENTS				
	7.5000 T.III.2.1110			2008	2007
ype o	f adjustment			Amount	Amount
	or expenses				
Busine	ss expenses for reservists, performing artis	ts, and fee-basis offic	ials		
	savings account deduction				
	g expenses (if moved in connection with job				
	nployed SEP, SIMPLE, and qualified plans				
	nployed health insurance				
	for early withdrawal of savings				
-	y paid (SSN)				
		al IRA Check if Roth			
Qualifie	ed student Ioan Interest paid (enclose Form 10	98-⊑)・・・・・・・・・		ı	
	ed student loan interest paid (enclose Form 10 tic production activities	98-E) · · · · · · · · · · ·			

TEMIZED DEDUCTIONS		
	2008 Amount	2007 Amount
Medical and Dental (less reimbursements)		
Medical/dental care insurance premiums (other than self-employed)		
Medicare B and D premiums from SSA-1099 and RRB-1099-R		
Qualified long-term care premiums		
Doctor, dentist, and hospital fees		
Prescription medicines and drugs		
Medical aids such as eyeglasses, contact lenses, and hearing aids		
Total transportation expenses		
Other medical and dental expenses		
Taxes Paid		
State and local income taxes paid (other than withholdings and estimates)		
Actual state and local general sales taxes paid		
Real estate taxes		
Personal property taxes (such as auto registration)		
Interest Paid		
Home mortgage interest paid to financial institution (enclose Form 1098 or statement) · · · ·		
Home mortgage interest paid to individual		
Individual's name		
Individual's address		
Individual's ID number		
Qualified mortgage insurance premiums (VA, FHA, RHS, or private)		
Investment interest expense		
Gifts to Charity (If additional lines are needed, attach similar statement)		
Contributions of cash or check		
Name of charity Date 2008 Amount		
Noncash contributions (attach Form 1098-C if vehicle donation)		
Name and address of organization   Date contributed   Fair Market Value		
Casualty and Theft Losses		
Casualty and theft losses (enclose supporting documentation with description		
of the casualty, description of the property, date acquired, cost of property,		
insurance reimbursements, and the fair market value before and after the casualty) · · · · · · · · · ·		
Miscellaneous Deductions		
Unreimbursed employee business expenses (such as union dues, small tools, travel, etc) · · · ·		
Tax preparation fees		
Other miscellaneous expenses (such items include safe deposit box rental, certain		
appraisal fees, expenses related to investment income, etcenclose supporting documentation)		
Other Miscellaneous Deductions		
Other miscellaneous deductions (such items include gambling losses, estate tax		
deduction, amortization of bond premium, etc enclose supporting documentation) · · · · · · · · · ·		

Caro providor namo	Address			SSN o	r FIN	Amount paid
Care provider name	Address			33110	I EIIN	during 2008
-						
_						
-						
-						
<u> </u>						
				I	I	
Student name	Edu	cational Institut	on	Fr So Jr Sr	Oth Tu	iition and Fees
Student name	Edu	cational Instituti	on	Fr So Jr Sr	Oth Tu	iition and Fees
EDERAL AND STATE ESTIMATED To Sederal estimated payments				Fr So Jr Sr		nition and Fees
EDERAL AND STATE ESTIMATED  Federal estimated payments  Applied from 2007 overpayment						
EDERAL AND STATE ESTIMATED  Federal estimated payments  Applied from 2007 overpayment  1st Quarter payment						
Federal estimated payments Applied from 2007 overpayment 1st Quarter payment 2nd Quarter payment						
1st Quarter payment 2nd Quarter payment 3rd Quarter payment						nount paid
Federal estimated payments Applied from 2007 overpayment 1st Quarter payment 2nd Quarter payment						
Federal estimated payments Applied from 2007 overpayment 1st Quarter payment 2nd Quarter payment 3rd Quarter payment 4th Quarter payment	TAX PAYMEN	TS	Date	paid	An	nount paid
Federal estimated payments Applied from 2007 overpayment 1st Quarter payment 2nd Quarter payment 3rd Quarter payment 4th Quarter payment State estimated payments					An	nount paid
Federal estimated payments Applied from 2007 overpayment 1st Quarter payment 2nd Quarter payment 3rd Quarter payment 4th Quarter payment State estimated payments Applied from 2007 overpayment	TAX PAYMEN	TS	Date	paid	An	nount paid
EDERAL AND STATE ESTIMATED  Federal estimated payments Applied from 2007 overpayment 1st Quarter payment 2nd Quarter payment 3rd Quarter payment 4th Quarter payment  State estimated payments Applied from 2007 overpayment 1st Quarter payment	TAX PAYMEN	TS	Date	paid	An	nount paid
Federal estimated payments Applied from 2007 overpayment 1st Quarter payment 2nd Quarter payment 3rd Quarter payment 4th Quarter payment  State estimated payments Applied from 2007 overpayment	TAX PAYMEN	TS	Date	paid	An	nount paid