

Airline Crew Taxes

2009

TAX ORGANIZER

2009

NEW CLIENT(S) **YES.**

GENERAL INFORMATION

Taxpayer

Spouse

First Name: _____

First Name: _____

Middle Initial: _____ Suffix: _____

Middle Initial: _____ Suffix: _____

Last Name: _____

Last Name: _____

Social Security Number: _____

Social Security Number: _____

Date of Birth: _____

Date of Birth: _____

Occupation: _____

Occupation: _____

Company/Base: _____

Company/Base: _____

Cell Phone: _____

Cell Phone: _____

Home Phone: _____

Home Phone: _____

E-mail: _____

E-mail: _____

(Important for file status updates/general communications.)

***None of your personal information is sold or shared.**

Filing Address (for IRS residency purposes): Several factors must be considered in determining your state of residency, however, no single item (drivers' license, voter registration, bank account state, etc.) will make you a resident.

Address: _____ Apt.# _____

City: _____ State: _____ Zip Code: _____

Mailing Address if Different (to send a copy of your tax return and invoice):

Dependents:

Full Name	Social Security #	DOB	Relationship	Full time student? Disabled (yes/no)?

Filing Status:

Single
 Married Filing Jointly
 Married Filing Separately
 Head of Household

Estimated/Quarterly tax payments for 2009 \$ _____ Sent directly by you to the IRS during the year (**Not from W2**.)

Life Events: Please check all that apply for 2009

- Marriage Divorce/Separation Birth/Adoption Bought Home: ***Important for tax credits.***
- Retirement (IRA, 401K) withdrawals Sold Stocks Own rental property
- Moved (more than 50 miles) Started a business or Operated a business
- Educational expenses/Interest Pd. Made "Energy Efficient" Home Improvements

Wages: Please enclose all W2's and/or 1099 Forms

Interest Income
Please provide 1099-INT(s)

Dividend Income
Please provide 1099-DIV(s)

Sale of Stocks: All detailed information is required; year end brokerage statements may not show purchase information. Enclose 1099-B and/or 1099 Consolidated Forms.

Description of Stock & Qty. Sold	Date Acquired	Purchase Price	Date Sold	Sell Price	Cost to Buy/sell

Business Income:

Please provide 1099-MISC and attach schedule "C" (available on our web site) with preliminary notes for us to work with. We will contact you for further information and details of your business expenses.

Rental Property:

Please attach Schedule "E" (available on our web site) with preliminary notes for us to work with. We will contact you for further information.

Retirement Plan Income:

Please provide form 1099-R

State and/or Local refund received for 2009

Please provide 1099-G check if itemized last year.

Social Security Benefits Received in 2009

Please provide form SSA-1099 or RRB-1099

Alimony Received:

\$ _____ \$ _____

Unemployment Compensation:

Please provide 1099-G

Gambling Winnings:

Please provide form W2-G if received or write the amount received. \$ _____

IRA Contributions:

Taxpayer	<input type="checkbox"/> Traditional	Spouse	<input type="checkbox"/> Traditional
\$ _____	<input type="checkbox"/> Roth	\$ _____	<input type="checkbox"/> Roth

Student Loan Interest Paid Deduction

\$ _____	\$ _____
Please provide 1098-E if available	Please provide 1098-E if available

Tuition Fees
Specify which tax payer or dependent.
List year of Degree Program (1st, 2nd)
It **can** be non college (real estate, etc.)

<input type="checkbox"/> Qualify for Hope	<input type="checkbox"/> Qualify for Hope
\$ _____	\$ _____
\$ _____	\$ _____
\$ _____	\$ _____

Alimony Paid: \$ _____

Recipient's SSN: _____

Medical Savings Account \$ _____

Coverage Self-only
 Family

<p>Moving Expenses: Must be at least 50 miles closer to your job/base. Include expenses like truck rental, hotel, laborers, supplies (boxes, tape, etc.). Even if you used your own car you can still write off the mileage/gas, etc.</p> <p>Date of move: _____ (Can be previous year move from 2008 if it was not written off in 2008 taxes.)</p>	<p>Miles from old home to job: _____ Miles from new home to job: _____ Transportation and Storage: \$ _____ Travel and Lodging: \$ _____ Supplies: \$ _____ Notes: _____</p>
<p>Medical Expenses: (*must exceed 7.5% of income!)</p> <p>Deductibles Paid: _____ Doctor/Dentist/Hospital: _____ Prescription Medicine: _____ Optometry/Eye Wear: _____ Medical Equipment/Other: _____ _____</p>	<p>Sales Tax \$ _____</p> <p>Include anything you paid sales tax on like cars, electronics, furniture, clothing, housewares, etc., Basically anything you paid tax on. We can also deduct a preset amount based on your income. However, the actual amount you paid may be higher, especially if you bought expensive items. For taxpayers in states with income tax, we will write off either your state income tax or the sales tax (whichever is higher)</p> <p>Sales tax paid on a vehicle purchase \$ _____ (This amount can be added to the preset amount)</p>
<p>Home Ownership:</p> <p>Property Taxes: _____ Mortgage Interest: _____ Points Paid: _____ PMI Insurance: _____</p> <p><i>Please provide 1098(s)</i></p> <p><small>* Do not include Rental Property information. 1098 and Property taxes along with anything pertaining to the rental should go on a Schedule E *</small></p>	<p>Charity Taxpayers must now keep a record of cash contributions of any amount. Examples are canceled checks, a bank copy of a cancelled check, a bank statement containing the name of the charity with date and amount, or a receipt from the charity with date and amount of contribution.</p> <p>Cash Contributions (Church etc.) \$ _____ <u>Non Cash Contributions:</u> Detail here or on notes section and we'll help with value. \$ _____ (receipt needed over \$500)</p>
<p>Other Taxes:</p> <p>State/local income taxes "not on W2": \$ _____ Yearly Automobile/RV/Boat taxes: \$ _____ Investment Interest Taxes: \$ _____</p>	<p>Casualty/Theft Loss/Floods/Hurricanes:</p> <p>_____ _____</p> <p>Include events not fully reimbursed by insurance. Explain: lists costs, Fair Market Value, and if job related.</p>
<p>State Tax Information: (N/A in TX, FL, TN, WA, AK, NV, WY) Not all information is applicable for all states</p>	
<p><u>California Renters Credit</u> : (Landlord info)</p> <p>Name _____ Address _____ City & Zip _____ Phone _____ Notes Related To State Taxes: _____ _____ _____</p>	<p>Residents of: <u>NJ,NY,OH,IN,MA,MI,MN,PA,VA</u></p> <p>Rents Paid _____ County _____ Municipality _____ School District _____ Notes: _____ _____</p> <p>529 Plan/College Savings Plan Contributions: _____</p>

Employee Related Itemized Expenses

Taxpayer

Spouse

Automobile Expenses:

(N/A for commute to or from work by car, only for non-commuting for example: Work meetings, training, etc.)

Vehicle – Make/Model/Year		
Date Placed in Service		
Total Miles Driven During Year		
Business Related Miles		
Average Round Trip Distance to Work		
If Leased, list payments, Yearly costs		
Tolls, parking, taxis, etc.		

Overnight Travel Expenses:

Travel Costs for commuters (airlines, trains, parking, etc.)		
Lodging:		
Auto Rentals, Taxi's, etc.		
Incidental Expenses (overnights)		
Tips (hotel vans, shoe shines, etc)		
Commuter Passes		
Other travel costs (cabs, buses, etc.)		
ATM fees, currency exchange fees		

Employee Expenses:

Non taxable per diem:

If not On W2, Box 12, Code L, then please submit your last pay stub of the year for us to obtain YTD information.

Meals & entertainment		
Only applicable if we do not compute your per diem.		
Percentage of Domestic vs. Int'l trips		
Computers, Equipment, Software		
<small>(for computer purchase give month bought for depreciation)</small>		
Flight gear, Luggage, Passport		
Union or Professional dues		
Trade Subscriptions/Magazines		
Uniforms & Protective clothing		
Uniform upkeep (cleaning & alterations)		
Education to maintain skills		
<small>(aircraft rentals, classes, renewals, seminars, etc.)</small>		
Office supplies & Equipment		

“Employee Related Itemized Deductions (Continued)”

Internet Fees (Home and overnights/commute) _____

Cell phone, PDA (purchased/monthly fee) _____

Special tools (Jepp binders, headset, sunglasses) _____

Job searching costs (even if not hired) _____

Legal investment or accounting fees _____

Flight Physical exam (pilots only) _____

Tax prep fees 2008 (if new client) _____

Other expense notes: List any other expenses like ID replacements, wings, alarm clock, travel hair dryer, bid service, answering machine, calling cards. Training out of base expenses, etc.

Gambling losses (only if claiming winnings): _____

Day Care Costs: Cost (Yr.) \$_____ Provider _____ Tax ID# _____
 Address _____ City _____ State _____ Zip _____

Did you make any Energy Savings Home Improvements to your main home? _____

Special Notes or instructions

Direct Deposit Information: Free! You can choose Direct Deposit even if not filing electronically.

Name of Bank: _____ Checking Savings

Routing Number: _____ Account Number: _____

If you file electronically we will complete IRS Form 8879 Electronic Filing Authorization.



Referral Program

Referred by: _____

Refer 5 new clients and have your Tax Return prepared at no charge (Up to \$140.00)!
Refer 3 new clients and receive 50% off your tax preparation fees (Up to \$70)!
Or get \$15 off your fees per new referral!

Thank You!