

Bottomline Tax & Business Services, Inc

Our Topline is Your Bottomline

ORGANIZER

2009

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Member: NSTP • ACAT-AIPB-ESBA-OI

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2009 tax return. Please enter all pertinent 2009 information.

CLIENT INFORMATION

		Taxpayer	Spouse
First name and initial			
Last name			
Title/suffix			
Social security number			
Occupation			
Date of birth (m/d/y)			
Date of death (m/d/y)			
I=blind			
Home phone			
Work phone			
Work extension			
Cell phone			
E-mail address			
Address	In care of		
	Street address		
	Apartment number		
	City		
	State		
	ZIP code		

DEPENDENTS

		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Social security number			
Relationship			
Months lived at home			
		Dependent No.	Dependent No.
First name			
Last name			
Title/suffix			
Date of birth (m/d/y)			
Social security number			
Relationship			
Months lived at home			

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Please enter all pertinent 2009 information. If you have attached a government form for an item, check the box and do not enter a 2009 amount.

WAGES, SALARIES AND TIPS

Employer name:

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

2009 Amount	2008 Amount
Attach Forms W-2	

INTEREST INCOME

Payer name:

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Attach Forms 1099-INT	

DIVIDEND INCOME

Payer name:

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Attach Forms 1099-DIV	

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Attach Forms 1099-R & W-2G	

Winnings not reported on W-2G

Total gambling losses

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history)
- Form 1099-MISC - Miscellaneous income
- Form 1099-S - Sales of real estate (also include closing statements)
- Form 1099-G - State tax refunds

Attach Forms 1099

Attach Forms 1099

Taxpayer:

- Form SSA-1099 - Social security benefits
- Form 1099-G - Unemployment compensation

Attach Forms 1099

Spouse:

- Form SSA-1099 - Social security benefits
- Form 1099-G - Unemployment compensation

Attach Forms 1099

MISCELLANEOUS INCOME

Taxpayer: Alimony received

Spouse: Alimony received

Other:

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RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: Traditional IRA contributions (1=maximum)
 Roth IRA contributions (1=maximum)
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)
 Spouse: Traditional IRA contributions (1=maximum)
 Roth IRA contributions (1=maximum)
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)

2009 Amount	2008 Amount

OTHER GOVERNMENT FORMS - DEDUCTIONS

Form 1098-E - Student loan interest
 Form 1098-T - Tuition and related expenses

Attach Forms 1098	
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ADJUSTMENTS TO INCOME

Taxpayer:
 Self-employed health insurance premiums
 Educator expenses
 Expenses from rental of personal property
 Other adjustments to income:

 Alimony paid - Recipient name & SSN

Spouse:
 Self-employed health insurance premiums
 Educator expenses
 Expenses from rental of personal property
 Other adjustments to income:

 Alimony paid - Recipient name & SSN

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs
 Doctors, dentists and nurses
 Hospitals and nursing homes
 Insurance premiums
 Long-term care premiums - taxpayer
 Long-term care premiums - spouse
 Insurance reimbursement
 Out-of-pocket lodging and transportation expenses
 Number of medical miles
 Other: _____

TAXES PAID

State income taxes - 1/09 payment on 2008 state estimate
 State income taxes - paid with 2008 state extension
 State income taxes - paid with 2008 state return
 State income taxes - paid for prior years and/or to other states

2009

1040

US

Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2009, please check the appropriate box and provide additional information if necessary.

YES

NO

- Did your marital status change during the year?
- Did your address change during the year?
- Could you be claimed as a dependent on another person's tax return?
- Were there any changes in dependents?
- Did you receive unreported tip income of \$20 or more in any month?
- Did you receive any disability income?
- Did you buy or sell any stocks, bonds or other investment property?
- Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
- Did you purchase any residential energy-efficient, solar energy, wind energy, geothermal, or fuel cell property or improvements?
- Did you purchase a new motor vehicle in 2009?
- Did you purchase a new alternative motor vehicle (hybrid, advanced lean burn, fuel cell, plug-in)?
- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?
- Did you transfer or rollover any amount from one retirement plan to another?
- Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
- Did you incur a loss because of damaged or stolen property?
- Did you use your car on the job (other than to and from work)?
- Do you want to electronically file your tax return?
- May the IRS discuss your tax return with your preparer?
- Was your home rented out or used for business?
- Were you notified or audited by either the IRS or the State taxing agency?
- Did you receive a \$250 economic recovery payment in 2009 that was made to social security recipients, railroad retirement recipients and certain veterans?
- Did your spouse receive a \$250 economic recovery payment in 2009 that was made to social security recipients, railroad retirement recipients and certain veterans?
- Did you receive a pension or annuity in 2009 for services performed as an employee of the U.S., state or local government from work not covered by social security?
- Did your spouse receive a pension or annuity in 2009 for services performed as an employee of the U.S., state or local government from work not covered by social security?