

Tax Organizer For 2007 Income Tax Return

Prepared For:

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Prepared By:

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P.O. Box 13682
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This Tax Organizer can be used to help identify the information needed to prepare your 2007 income tax return. Enter your 2007 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 2006 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 2007 income tax return.

If you have any questions, please feel free to contact me at (678)596-7091.

IRA, PENSION, AND ANNUITIES (Please enclose all copies of 2007 Form 1099-R)

T = Taxpayer S = Spouse

		2007				2006	
T S	Payer's Name	Check if IRA	Box 1	Box 4	Amount rolled over into:		Gross distribution
			Gross distribution	Federal income tax withheld	Regular IRA	Roth IRA	

Total IRA basis for 2006 and prior years _____ **Taxpayer** _____ **Spouse**
 Value of all traditional IRA's as of December 31, 2007 _____

ANNUITIES AND PENSIONS BY THE RAILROAD RETIREMENT BOARD (Please enclose all copies of 2007 Form RRB-1099-R)

T = Taxpayer S = Spouse

		2007		2006
T S	Payer's Name	Box 7	Box 9	Total gross paid
		Total gross paid	Federal income tax withheld	

PAYMENTS FROM QUALIFIED EDUCATION PROGRAMS (Please enclose all copies of 2007 Form 1099-Q)

T = Taxpayer S = Spouse

		2007			2006	
T S	Payer's Name	Box 1	Box 5			Gross distributions
		Gross distributions	Private	State	Coverdell	

PARTNERSHIPS, S CORPORATIONS, ESTATES AND TRUSTS (Please enclose all copies of 2007 Schedule K-1)

Schedule K-1 (1065) Partnerships:			
Partnership's name	ID Number	Partnership's name	ID Number
Schedule K-1 (1120S) S Corporations:			
Corporation's name	ID Number	Corporation's name	ID Number
Schedule K-1 (1041) Estates or Trusts:			
Name of Trust or Estate	ID Number	Name of Trust or Estate	ID Number

BUSINESS INCOME AND EXPENSES

Indicate the owner of this business: Taxpayer Spouse Joint

Business Name: _____

Business Address: _____

City, State, and Zip Code: _____

Business product or service: _____

Did you start or acquire this business during 2007? Yes No

Accounting Method: Cash Accrual Other (describe)

Method used to value inventory: Cost Lower of cost or market Other (describe)

Income and Cost of Goods Sold	2007 Amount	2006 Amount
Gross receipts or sales		
Returns and allowances		
Other income (enclose description)		
Inventory at beginning of year		
Purchases less cost of items withdrawn for personal use		
Cost of labor		
Materials and supplies		
Other costs		
Inventory at end of year		

Expenses	2007 Amount	2006 Amount		2007 Amount	2006 Amount
Advertising			Rent - Vehicle, machinery		
Commissions and fees			Rent - Other		
Contract labor			Repairs and maintenance		
Depletion			Supplies		
Employee benefits			Taxes and licenses		
Insurance (other than health)			Travel		
Mortgage interest			Meals and entertainment		
Other interest			Utilities		
Legal and professional fees			Wages		
Office expenses			Other (enclose listing)		
Pension and profit sharing					

Vehicle Information

Vehicle description _____ Date placed in service _____ Cost or basis _____

Business miles _____ Commuting miles _____ Other miles _____

Actual expenses such as gas, oil, repairs, etc _____ Parking fees and tolls _____

Sales, Purchases, and Disposition of Assets in 2007
(New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales Price

Business Use of Home

Area used exclusively for business _____ Total area of home _____

Was the home used as a day care facility? Yes No Date home placed in service _____

Casualty losses _____ Insurance _____ FMV of home _____

Mortgage interest _____ Repairs and maintenance _____ Value of land _____

Real estate taxes paid _____ Utilities and other expenses _____

CAPITAL GAINS AND LOSSES (Please enclose all copies of 2007 Form 1099-B or similar statements)

T = Taxpayer S = Spouse J = Joint

T	S	J	Description and number of shares	Date acquired	Date sold	Cost or other basis	Sales proceeds

OTHER INCOME

Type of income	2007 Amount	2006 Amount
State and local tax refunds (enclose Form 1099-G)		
Alimony received		
Unemployment compensation (enclose Form 1099-G)		
Social security benefits (enclose Form SSA-1099)		
Other income such as gambling winnings, jury duty pay, etc... (Include description and any supporting documentation)		

OTHER ADJUSTMENTS

Type of adjustment	2007 Amount	2006 Amount
Educator expenses		
Business expenses for reservists, performing artists, and fee-basis officials		
Health savings account deduction		
Moving expenses (if moved in connection with job)		
Self-employed SEP, SIMPLE, and qualified plans		
Self-employed health insurance		
Penalty for early withdrawal of savings		
Alimony paid (SSN _____)		
IRA contributions made for 2007 Check if Traditional IRA <input type="checkbox"/> Check if Roth IRA <input type="checkbox"/>		
Qualified student loan interest paid (enclose Form 1098-E)		
Domestic production activities		
Other (include description of adjustment)		

ITEMIZED DEDUCTIONS

	2007 Amount	2006 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																																
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:45%;">Name of charity</th> <th style="width:10%;">Date</th> <th style="width:45%;">2007 Amount</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>	Name of charity	Date	2007 Amount																													
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Noncash contributions (attach Form 1098-C if vehicle donation)																																
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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, etc...enclose supporting documentation)																																
Other Miscellaneous Deductions																																
Other miscellaneous deductions (such items include gambling losses, estate tax deduction, amortization of bond premium, etc... enclose supporting documentation)																																

CHILD AND DEPENDENT CARE EXPENSES (Enter expenses paid for each dependent in Dependent's section)

Care provider name	Address	SSN or EIN	Amount paid during 2007

HIGHER EDUCATION EXPENSES (Please enclose all copies of 2007 Form 1098-T)

Student name	Educational Institution	Fr	So	Jr	Sr	Oth	Tuition and Fees

FEDERAL AND STATE ESTIMATED TAX PAYMENTS

Federal estimated payments	Date paid	Amount paid
Applied from 2006 overpayment		
1st Quarter payment		
2nd Quarter payment		
3rd Quarter payment		
4th Quarter payment		

State estimated payments for:	Date paid	Amount paid
Applied from 2006 overpayment		
1st Quarter payment		
2nd Quarter payment		
3rd Quarter payment		
4th Quarter payment		