2009	1040	US	Tax Organizer

Gregory D. Barton, CPA & Associates
777 E Tahquitz Canyon Way Suite 320
Palm Springs, CA 92262
Telephone number: (760) 969-6499
Fax number: (760) 325-8269
E-mail address:

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)		
1=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:

	2009 Amount	2008 Amount
	Attach Forms W-2	

INTEREST INCOME

Payer name:

	2009 Amount	2008 Amount
	Attach Forms 1099-INT	

DIVIDEND INCOME

Payer name:

	2009 Amount	2008 Amount
	Attach Forms 1099-DIV	

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

	2009 Amount	2008 Amount
	Attach Forms 1099-R & W-2G	
Winnings not reported on W-2G		
Total gambling losses		

OTHER GOVERNMENT FORMS - INCOME

	2009 Amount	2008 Amount
Form 1099-B - Sales of stock (also include transaction history)	Attach Forms 1099	
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	
Taxpayer:		
Form SSA-1099 - Social security benefits	Attach Forms 1099	
Form 1099-G - Unemployment compensation		
Spouse:		
Form SSA-1099 - Social security benefits	Attach Forms 1099	
Form 1099-G - Unemployment compensation		

MISCELLANEOUS INCOME

	2009 Amount	2008 Amount
Taxpayer: Alimony received		
Spouse: Alimony received		
Other:		

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RETIREMENT PLAN CONTRIBUTIONS

	2009 Amount	2008 Amount
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)		

OTHER GOVERNMENT FORMS - DEDUCTIONS

	2009 Amount	2008 Amount
☐ Form 1098-E - Student loan interest	Attach Forms 1098	
☐ Form 1098-T - Tuition and related expenses		

ADJUSTMENTS TO INCOME

	2009 Amount	2008 Amount
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

	2009 Amount	2008 Amount
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

	2009 Amount	2008 Amount
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		

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TAXES PAID (continued)

	2009 Amount	2008 Amount
City/local income taxes - 1/09 payment on 2008 city/local estimate		
City/local income taxes - paid with 2008 city/local extension		
City/local income taxes - paid with 2008 city/local return		
State and local sales taxes (except autos and special items)		
Sales taxes paid on vehicles, boats, and aircraft		
Use taxes paid on 2009 purchases		
Use taxes paid on 2008 state return		
☐ New passenger auto's, light trucks & motorcycles purchased 2/17/09 - 12/31/09	Attach Vehicle/Tax Information	
Sales tax on auto's not included above		
Sales taxes paid on boats, aircraft, and other special items		
Real estate taxes - principal residence		
Real estate taxes - property held for investment		
Foreign income taxes		
☐ Personal property taxes (including automobile fees in some states)	Attach Tax Notice	

INTEREST PAID

	2009 Amount	2008 Amount
Home mortgage interest and points paid:		
☐	Attach Forms 1098	
☐		
Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):		
Points not reported on Form 1098:		
Mortgage insurance premiums on post 12/31/06 contracts		
Investment interest (interest on margin accounts):		
Passive interest		

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

	2009 Amount	2008 Amount
Volunteer expenses (out-of-pocket)		
Number of charitable miles		

NONCASH CONTRIBUTIONS

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

	2009 Amount	2008 Amount

MISCELLANEOUS DEDUCTIONS

	2009 Amount	2008 Amount
Union and professional dues		
Tax return preparation fee		
Safe deposit box rental		
Investment expenses		
Estate tax, section 691(c)		
Unreimbursed employee expenses:		
Other:		

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CLIENT INFORMATION

Filing Status	Filing status (table)	
	1=married filing separate and lived with spouse	
	Year spouse died, if qualifying widow(er) (2007 or 2008)	
Taxpayer	First name and initial	
	Last name	
	Title/suffix	
	Social security number	
	Occupation	
	Date of birth (m/d/y)	
	Date of death (m/d/y)	
	1=blind	
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)	
	1=blind	
Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	
Foreign Address	Region	
	Postal code	
	Country	

Filing Status

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying widow(er)

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Please add, change or delete information for 2009.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone	
	Work phone	
	Work extension	
	Daytime phone (table)	
	Mobile phone	
	Pager number	
	Fax number	
	E-mail address	
Spouse Contact Information	Home phone	
	Work phone	
	Work extension	
	Daytime phone (table)	
	Mobile phone	
	Pager number	
	Fax number	
	E-mail address	

Daytime Phone

1 = Work
2 = Home
3 = Mobile