

2007 Tax Organizer

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Thank you for choosing **Tax Crew**

Please complete the sections of the Organizer that apply to you and mail the organizer and copies of your applicable forms to the address below. We recommend that you keep the originals of your forms in your possession.

Forms W-2
 Copy of last year's tax return (new clients)
 Flight Information (please see Per Diem Calculation page)

Forms 1099, 1099R, 1099-MISC, Forms 1098, 1098G
 Schedules K-1
 Any other information notices you have received

If someone referred you to us, please include their name here

Free Electronic Filing	The IRS requires us to keep a signed copy of Form 8879. Once we complete your return we'll provide you with the information for lines 1-5. Select a 5 digit PIN, sign the form and mail to us.	To e-file your return, initial here.
Authority to discuss your return with IRS	Tax preparers may discuss return preparation, refund and payment issues with the IRS on your behalf. If you authorize Tax Crew to discuss these matters for you, please initial here:	

A. Personal Information

	Name (as it appears on your Social Security Card)	Social Security	Occupation	Birth date	Pres election campaign fund
Taxpayer					Yes <input type="checkbox"/> No <input type="checkbox"/>
Spouse					Yes <input type="checkbox"/> No <input type="checkbox"/>

Tax Address					
Mailing Address (if different)					
Telephone	Second phone	Email	Fax	Best method/time to contact you	Check here to receive tax news by email. <input type="checkbox"/>
Direct Deposit	For direct deposit of your refund, please include a voided check.				

Filing Status (circle one)

Single
 Married Filing Jointly
 Qualifying Widow(er)
 Spouse's date of death _____

Married Filing Separately

Spouse name	_____	Spouse Social Security number	_____
Did you live with your spouse any time after June 30?		Yes <input type="checkbox"/>	No <input type="checkbox"/>

Head of Household - If you are the custodial parent, but someone else is claiming the exemption, complete this section. List other dependents in Section B.

Name	_____	SSN	_____	No. mos living w/you	_____
Relationship	_____	Who is claiming this exemption		_____	

B. Dependent Information

Name (as on Social Security card)	SSN	Birth Date	Relationship	Mos at home in 2006	Income >\$3300?	Code+
					Yes <input type="checkbox"/> No <input type="checkbox"/>	
					Yes <input type="checkbox"/> No <input type="checkbox"/>	
					Yes <input type="checkbox"/> No <input type="checkbox"/>	
					Yes <input type="checkbox"/> No <input type="checkbox"/>	

+Codes L=Dependent who lived with you; CN=Child who did not live with you due to divorce or separation (include copy of Form 8332 or divorce decree); Y=Child was a full time student for at least 5 months and age 19-24; O=Other dependent (other than child) who did not live with you.

C. Questions for new clients

Please circle the Federal form you filed last year	1040 <input type="checkbox"/>	1040A <input type="checkbox"/>	1040EZ <input type="checkbox"/>
Amount of last year's Federal refund		Amount of last year's State refund	
Or additional tax due		Or additional tax due	

D. Miscellaneous Income

Unemployment compensation		Alimony received	
Social Security income		Other	
If you received an Advanced Child Tax Credit check from IRS last year, please enter the exact amount of the check			

E. Adjustments to Income

Contributions to Traditional IRA made between last January 1 and April 15 of this year		If you previously filed Form 8606 (non-deductible IRA contributions) enter amount on Line 12 of last 8606 of filed		
Contributions to Roth IRA made between last January 1 and April 15 of this year		Contributions to Self Employed Retirement Plan made between last January 1 and April 15 of this year		
Would you like us to calculate your maximum allowed contribution to a:	Traditional IRA?	Yes No	Roth IRA?	Yes No
			Self-employed retirement plan?	Yes No
Alimony payments	Name and Social Security Number of recipient			

Retirement Plan Distributions, Rollovers, Recharacterizations

401(k)/Traditional IRA	Distribution	Distribution	Distribution	Distribution
Name of payer				
Gross distribution				
Distribution date				
Basis in account (non-tax deductible contributions)				
Amount of prior distributions				
Reason for distribution (first home purchase, higher education costs, converted to Roth IRA, etc)				
Amount rolled over				
Name of receiving institution				
New account type (Roth, Traditional Ira)				
Roth IRA				
Name of payer				
Gross distribution				
Distribution date				
Reason for distribution				
Basis in account (your contributions)				
Amount of prior distributions				
Value of account on December31				
Military Reservists: 2006 legislation eliminated the early withdrawal penalty for retirement account withdrawals while on active duty. If you previously paid the penalty, we can amend your prior year tax returns to claim your additional refund.	Did you incur an early withdrawal penalty while on active duty in 2006?			Yes No

F. Interest Income (please enclose copies of interest statements)

Institution	Amount	Institution	Amount

G. Dividend Income (please enclose copies of dividend statements)

Institution	Box 1 Dividends	Box 2A Capital Gains	Box 2B 28%	Box 2C Qual. 5yr gain	Box 6A Foreign tax

H. Child Care Credit

Provider's Name and Address	Tax ID or Social Security #	Care provided for:	Amount paid

I. Education Savings Accounts

For contributions made on or before 12/31	Student/Beneficiary	Amount
Coverdell Education Savings Plan		
Coverdell Education Savings Plan		
State College Savings 529 Plan	St. Plan:	
State Prepaid Tuition Program	St. Plan:	

J. Education Deductions and Credits

You may claim a deduction or credit for qualified tuition and related expenses you pay for yourself, your spouse, or a dependent for whom you claim an exemption on your tax return. Married taxpayers must file a joint return to qualify. Qualified expenses include tuition and fees required for enrollment or attendance at an eligible educational institution. Student activity fees, and fees for course-related books, equipment and supplies are qualified expenses only if they must be paid directly to the institution as a condition of enrollment or attendance. Taxpayers may not claim both the deduction and the credit for the same student. Based on the information you provide below, we will determine your greatest tax benefit.

Student's Name			
School Name			
School City and State			
Qualified expenses paid			
Year in college	1 st 2 nd 3 rd 4 th Grad Student	1 st 2 nd 3 rd 4 th Grad Student	1 st 2 nd 3 rd 4 th Grad Student
At least half-time student?	Yes No	Yes No	Yes No
Number of years Hope Credit was claimed for student (circle one)	1 year 2 years Never claimed	1 year 2 years Never claimed	1 year 2 years Never claimed
Amount of 529 Plan withdrawal			

K. Medical Expenses

Do not include amounts reimbursed by insurance or flexible savings accounts. Your out of pocket expenses must be over 7.5 percent of your income to be deductible. Some states also allow a medical deduction. Disability and Accident insurance premiums are not deductible.

Prescriptions		Physician, Dentist, Chiropractor fees	
Contacts/Glasses		Lab/Hospital Fees	
Insurance Premiums - Do not include pretax		Counseling/Psychotherapy	
Medical Travel—Miles driven		Other transportation/lodging costs	

L. Tax and Interest Expenses

Additional taxes paid with last year's state return		Real Estate taxes on principal residence	
Auto License (portion based on value of the car)		Real Estate taxes paid on additional homes/land	
Other personal property taxes		Mortgage interest on principal residence	
Investment interest (e.g. margin interest)		2nd Mortgage/home equity loan	
Points paid on home purchase		Mortgage on 2nd or vacation home	
Points paid on refinance		Date of refinance	
			Life of Loan (in years)
Qualified Student Loan Interest Paid			

M. Charitable Contributions

The IRS requires receipts for any individual cash donation that is more the \$250.00. Beginning with the 2007 tax year, the IRS will require a receipt or bank record (cancelled check, credit card statement, etc) for all cash donations.

If your non-cash contributions (clothing, household items, etc) are greater than \$500.00 for the year, please provide itemized information on the next page of this organizer. If you donated a vehicle in 2006, you will receive Form 1098-C from the organization. Please include this form to receive credit for your donation.

Cash contributions to qualified organizations		Number of miles driven for charitable purposes	
Parking, fees, tolls, etc paid while performing charitable service		Value of non-cash charitable contributions	

Non-Cash Contribution Itemization (include information about vehicle donations below) Please complete this section if your total non-cash contributions for the year were over \$500.

Name and address of organization			
Items donated (general categories such as clothing, toys, household items, electronics)			
Date donated	Date acquired	How acquired	Cost or adjusted basis
Fair market value at time of donation	Method used to determine value (appraisal, blue book, thrift shop value)		
Name and address of organization			
Items donated (general categories such as clothing, toys, household items, electronics)			
Date donated	Date acquired	How acquired	Cost or adjusted basis
Fair market value at time of donation	Method used to determine value (appraisal, blue book, thrift shop value)		
Name and address of organization			
Items donated (general categories such as clothing, toys, household items, electronics)			
Date donated	Date acquired	How acquired	Cost or adjusted basis
Fair market value at time of donation	Method used to determine value (appraisal, blue book, thrift shop value)		
Name and address of organization			

N. Miscellaneous Deductions

Tax preparation fees paid last year		Safe deposit box		IRA Custodial fees	
Tax mailing/FedEx fees		Investment publications		Other investment expense	
Investment counsel		Other expenses		Gambling losses (to extent of winnings)	

O. Moving Expenses (only list job related moves greater than 50 miles)

Distance from old home to new workplace		Distance from old home to old workplace		Moving transportation and storage costs		Travel/lodging expenses for move	
Miles driven for move		Number of cars moved		Old base		New base	

P. Estimated Tax Payments List prepayments you made on your 2006 taxes, OTHER THAN W-2 withholding.

	Date	Amount	Date	Amount	Date	Amount	Date	Amount
Federal								
State								
Local								

Q. State Tax Information (Please complete first 3 columns even if you did not move. If you moved to a new state, please include date of move)

State	County	School District	Date Entered State	Date Left State

R. Property Tax Credit

CT Residents	District	List #	Date Paid	Amount MI Residents – last year's taxable value from Property Tax Statement		
Home				MN Residents - Include copy of Property Taxes Payable next year		
Auto				VA Residents – last year's taxable value on Property Tax Statement		
Auto				NJ Res Lot	Block	Qualifier

S. Renters Credit (If you paid rent at your tax address, you may qualify for a renter's credit in CA HI IN MA MI MN NJ WI)
MN residents please send us a copy of your Certificate of Rent Paid

Address rented					
Landlord's name/address					
Total monthly rent		Your portion		Months rented	
				Is heat included in rent?	
				Yes <input type="checkbox"/> No <input type="checkbox"/>	
Landlord's Tax ID Number			NJ Residents only, please complete roommate information below:		
Roommate's Name			Roommate's Social Security Number		Roommate's share of rent

T. Small Business/Self-Employed Income

Business Name		Ownership (circle one)		Taxpayer Spouse Joint	
Business address (if different than home address)					
Gross Income		Parking fees, tolls			
Income reported to you on Form 1099 (please include copies)		Pension and profit-sharing plans			
Returns and allowances		Rent or lease a Vehicles, machinery, equipment			
Advertising		Other business property			
Bad debts from sales or service		Repairs and maintenance			
Car and truck expenses		Supplies			
Type & year of vehicle		Taxes and licenses			
Date first used for business		/ /		Travel costs	
Do you have another car for personal use?		Meals and entertainment			
Number of miles driven for business use		Telephone			
Number of miles driven for commuting		Utilities			
Number of miles driven for personal use		Wages			
Do you have another vehicle available for personal use?		Other expenses			
Was your vehicle available for off-duty hours?		Inventory at the beginning of the year			
Commissions and fees		Purchases less cost of items used personally			
Depletion		Cost of labor (do not include your salary)			
Insurance (other than health)		Materials and supplies			
Interest		Other costs			
Legal & professional services		Inventory at the end of the year			
Office expense		Cost of goods sold			
Description of asset used in business		Date placed in service	Cost or basis	Percentage business use	

Vehicle Expense The IRS requires written documentation of business miles to claim the deduction.

Vehicle year, make & model		Do you have another car available for personal use?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Vehicle type (circle one)		<6,000lbs 6,000lbs-13,000lbs >13,000lbs		Do you have evidence to support your deduction?	
Date first used for business		Is this evidence written?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Number of miles driven for business		Was the vehicle leased?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Number of miles driven for personal use		Monthly lease payment			
Number of miles driven for commuting					

Actual vehicle expenses – To claim actual vehicle expenses instead of the standard mileage rate, please complete this section

Purchase price or cost basis in vehicle		Gasoline, oil, repairs, insurance, etc.	
Section 179 expense elected		Vehicle registration, license	

Business Use of Home

Total square footage of home		Total homeowner's/renter's insurance premium	
Square footage of area used for exclusively for business		Total annual utilities	
Homeowners - Total home mortgage interest paid		Total real estate taxes	
Homeowners - Home purchase price/cost basis		Date you first used home office	
Renters - Annual rent paid		Number of months used as home office last year	

Additional information, notes:

U. Stock, Bond, Securities Sales We must have this following information to accurately calculate capital gains/losses. If your broker does not provide it in your yearend account statement, please contact your broker for this information. Attach sheets if necessary.

Quantity and description	Purchase date	Date sold	Sales price minus commissions	Purchase price or basis including commissions

V. Rental and Royalty income

Property	Date first used as rental	Purchase Price	Cost of land	Ownership %	Address
1					
2					
3					

Property	1	2	3	Property	1	2	3
Rents received				Mgmt fees			
Advertising				Mortgage Interest			
Automobile mileage				Property Tax			
Association dues				Repairs			
Cleaning/Maint				Supplies			
Commissions				Telephone			
Insurance				Travel to property			
Legal/Prof fees				Utilities			

Number of days of personal use of property.

Property 1, 2 or 3	Property improvements, upgrades, capital expenditures	Date purchased	Cost

Sale of Rental Property: Please include copies of the purchase and sale Settlement Statements and (for new clients) copies of tax returns for the years the property was used as a rental.

Energy Credits

You may qualify for a tax credit if you made energy efficient improvements to your home. Improvements must meet specific performance standards to qualify. Your retailer, manufacturer or contractor can provide you with specific information on whether your improvement qualifies. You may also get details at www.energystar.gov. Please include receipts for qualifying purchases.

Air conditioning		Exterior doors, windows	
Exterior doors, windows		Insulation material or system	
Solar water heating property (excluding pools, hot tubs)		Metal roof with heat reduction pigmented coating	
Oil, natural gas, propane furnace or hot water boiler		Fuel cell property	
Electric/geothermal heat pumps		Advanced main air circulating fan	
Electric, natural gas, oil, propane water heater		Photovoltaic property	

Hybrid/Alternative fuel vehicles may qualify for a tax credit if purchased after January 1, 2006. Please include a copy of your Manufacturer's Certificate and sales receipt to claim your credit. If you purchased a hybrid/alternative fuel vehicle in 2006, please list the purchase date: ____/____/____

W. Employee Business Expenses

Please enter category totals in shaded areas below. Additional itemization is provided for your convenience to illustrate the items that are deductible. The IRS requires receipts for individual expenses over \$75.00. If the expense is under \$75.00, the IRS accepts a record in a logbook or journal that lists the expense, date and cost.

Non-taxable per diem (listed on your W-2 in box 12 with code 'L')	\$	Uniform Luggage	Business phone
		Flight bag	If you are on reserve, your monthly cell phone bill is deductible. If you are a schedule holder, deduct business related calls. If you are not on reserve, deduct business related calls. Calls to scheduling, code-a-phone, voice response and calls to home area while on a trip are business related calls.
Transportation		Garment bag	
Tips for van divers		Luggage repair	
Rental cars/taxi fares/parking		Luggage tags	
Co-terminal transportation		Miscellaneous luggage items	
Cab/parking fares for short calls		Suitcase	Answering machine/service
Transportation to training/meetings		Tote bag/Purse	Business related phone calls
Total Transportation expenses	\$	Wheels for luggage	Calling cards/Collect/Hotel phone calls
Union and professional dues		Total luggage purchase/repair	Call waiting
Union Initiation fees/Union dues		Bid service, Computer fees	Cell phone purchase
Professional organizations		Bid service fees	Monthly prorated cell fees (line holders)
Total Union & professional dues	\$	ISP fees (prorated to business use)	Monthly cell fees on (reserves)
Work related publications	\$	Trip trading service fees	Pager purchase/usage fees
Uniform purchase, cleaning, repair		Total bid service, computer fees	Second telephone line
Belt		Work equipment, supplies	Voicemail
Coat		Accessories used on layovers	Total business phone
Dress		Alarm clock	\$
Dry cleaning		ATM/check cashing fees on layovers	Training/Education/Job Hunting
Epaulets		Batteries	Books
Jacket		Business cards	Course fees
Hair clips		Cockpit keys/corkscrew/flashlight	Dry cleaning/laundry in training
Hat		Cockpit supplies (maps etc)	Hotel
Laundry		Copying/fax/mailing costs	Maintaining/additional ratings
Maternity dress		Currency converter/Exchange fees	Other job-hunting fees/expenses
Nametags/Wings		Earpiece (pilots)	Proficiency training/simulator time
Pants		FAA medical certificate	Resume printing/mailing
Scarf/		Galley supplies	Transportation/Parking
Serving garments		Hair dryer/ Curling iron/Clothes iron	Total job-hunting/Training
Shirt		ID replacement	\$
Shoe repair		Loss of license insurance	Training dates City
Shoe shines		Manuals /Organizer	Special/Temporary Assignment
Support hose		Passport/Visa fees and photos	Commuting/Local transportation/Tips
Sweater		Portable security dvc/smoke detector	Dry cleaning/Laundry
Tie		Sunglasses (pilots only)	Housing/ Utilities/Phone
Uniform alterations/repair		Upgrade training expenses	Shipping/storage
Vest		Voltage converter	Total Temporary Assignment
Total uniform expense	\$	Total work equipment, supplies	\$

Commuter Apartment Moving Expenses – If you transferred to a new base and incurred moving expenses, please list below:

The IRS defines your primary workplace as your tax home and does not allow a deduction for the cost of maintaining a commuter place. An exception to this is if you have a second job in the area of your residence. In those cases, the IRS allows a deduction for the cost of commuting from one job to another.

Old base		New base		Travel Expense	
Distance driven to transport belongings				Shipping Expense	
Date moved		/	/	Lodging expense during move	

X. K-12 Education Credits (For residents of AZ, IL, IA and MN)

You may claim a credit on your state return in these states for the following qualified expenses:

AZ- Fees and donations to a public or charter school located in Arizona for extracurricular or character education programs. Expenses over \$250.00 are carried over to the following year.

IL – Tuition, fees, book rental, band and lab equipment rental fees paid directly to private, public or religious schools.

IA – Tuition and textbook costs paid to an Iowa accredited not-for-profit school. Certain extracurricular program expenses qualify, such as activity fees, club dues, and school sports fees.

MN – Tuition and fees paid to private or public schools. Also costs of education supplies including up to \$400 towards the purchase of a home computer and educational software.

Student's Name	Expenses	School Name	School Address

Y. State Credits & Deductions

The following credits and deductions are available on your state return if you file a return in the state listed.	Amount
California – Expenses associated with the purchase and installation of solar energy equipment	
Delaware – Clothing and expenses incurred for service as an active volunteer firefighter	
Georgia – Costs of home care services provided for person(s) over age 62	
Hawaii – Cost of child restraint system	
Idaho – Insulation purchased in 2006 and installed in primary residence	
Indiana – Insulation Age of house Purchase date Installation date	
Massachusetts – Legally married same sex partners must file as MFJ or MFS. Are you legally married to a same sex partner?	Yes No
Qualified commuter expenses paid for public transportation	
Montana – First Time Homebuyers Savings Account	
Ohio – Job Training Expenses incurred after layoff or furlough	

Z. Foreign Domicile

Date foreign residence began		Date foreign residence ended	
Will foreign residence last at least 1 year?		Are you subject to tax in the base country?	Yes No
Country of citizenship		If yes, what type of tax?	
Did family members live abroad with you?		Type of work Visa you were issued	
Have you filed Form 2555 previously?	Yes No	If yes, what year?	

If you kept a home in the United States while you were based outside of the U.S., please list dates, address and relationship of occupants:

If you were in the United States during the tax year (excluding work related purposes, such as layovers or training, please complete below:

Date arrived US	Date left US	Date arrived US	Date left US	Date arrived US	Date left US
/ /	/ /	/ /	/ /	/ /	/ /
/ /	/ /	/ /	/ /	/ /	/ /
/ /	/ /	/ /	/ /	/ /	/ /

World's Best Rates on Per Diem Calculations and Tax Preparation

Tax Preparation fees (N/C = no charge for form with tax preparation)

Crew Package Our Best Deal! (Does not include state return)	1040, Schedules A&B, 2106, Per Diem Report	120.00	1040 without meal expense calculation	1040, A, B	95.00
State return (price per state)		20.00	Injured spouse/Innocent spouse	8379/8857	20.00
Local return		20.00	Investment interest expense	4952	10.00
Married couples (additional)		20.00	Investment tax for children under 14	8615	20.00
Additional tax on retirement income	5329	20.00	Mortgage interest credit	8396	10.00
Alternative Minimum Tax	6251	20.00	Moving expenses	3903	10.00
Business use of home	8829	20.00	Non-deductible IRA	8606	10.00
Charitable non-cash contributions over \$500	8283	20.00	Parents reporting child's income	8814	20.00
Casualty Loss/Theft	4685	20.00	Partnership/S-Corp/Estate (per schedule)	K-1	20.00
Child care credit	2441	10.00	Passive activity loss	8582	20.00
Child tax credit		N/C	Rental Property (per property)	E	20.00
Additional child tax credit	8812	10.00	Sale of business assets	4797	40.00
Earned Income Credit	EIC	10.00	Sec 1256 Contracts and Straddles	6781	20.00
Education credit/deduction	8863	20.00	Self employed/small business	C	30.00
Extension of time to file	4868/2688	N/C	Self employment tax	SE	N/C
Farm Income	F	40.00	Stock/bond distributions	D	20.00
Foreign earned income exclusion	2555	40.00	Traditional IRA to Roth IRA rollover		10.00
Household employee taxes	H	20.00	Telephone Excise Tax Credit	8913	40.00

Other Items

Per Diem Calculation only Please send us your 12 monthly activity statements or logbook showing flight information. It's not necessary to complete the tax organizer if we are only calculating your per diem expenses.	40.00	Per Diem Calculation & Form 2106 (Employee Expenses) Please complete Section W of Tax Organizer, including amount of non-taxable per diem you received for the year.	50.00
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Please fax a copy of my Per Diem Report to:	Name	Fax number

Special handling for tax organizers postmarked after March 22	20.00
Withhold your tax preparation fee from your refund	31.00
Total	

<input type="checkbox"/> Please bill my credit card	<input type="checkbox"/> I have enclosed a check	<input type="checkbox"/> Withhold my fee from my refund
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Credit Card Payment Information		
Name on credit card	Card Number	Expires on
Billing address (if different than on front of organizer)	Signature authorizing credit card charge	

Refer a Friend	Our best advertising is a personal referral. For every new client you refer to Tax Crew, we'll send you a check for \$10.00 as our thank you. Tell your friends to include your name on the front of the organizer.
Free Tax Evaluation	If we haven't prepared your returns in the past, you may have paid too much income tax. We'll evaluate your returns for the last three years at no charge and with no obligation to amend the return. We'll advise you of any additional refund due. If you decide to file an amended return, our fee is \$100.00 per year and includes all forms required for Federal and State amendments. All we need to get started are: a copy of the return you already filed, copies of your W-2s, Activity statements showing layover information and a completed tax organizer for and deductions you did not claim on the original return.

Rates and terms listed on this organizer are effective through December 31, 2008 and are subject to change thereafter.