

2009 Tax Organizer

10 Santa Clara
San Clemente, CA 92672
Phone: 888TAXCREW (829.2739)
Fax: 949.309.2902
Email: info@mytaxcrew.com
www.mytaxcrew.com

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

New Clients: Who referred you to Tax Crew?

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 – address in the state where you pay state income taxes.

Mailing Address – where you want us to mail correspondence – if different than your tax address.

Home phone	Cell phone	Fax	Best method/time to contact you

Email address **Check here to receive tax news by email.**

Direct Deposit For direct deposit of your refund, please include a voided check or include bank information:

Routing Transit Number		Full account number		Checking or savings (circle one)
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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 No

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 2009	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. General Questions

Do you have children under age 24 with investment income over \$1900 in 2009? If yes, please attach 1099s.	
Did you have any debts cancelled, forgiven or refinanced? If yes, include any 1099-Cs you received.	
Did you have any bank or financial accounts in foreign countries with a combined value over \$10,000?	

Home Buyer Tax Credits

First Time Homebuyer Tax Credit - If you purchase your first home between April 8, 2008 and June 30, 2010, you are eligible for a tax credit of the lesser of \$8,000 or 10% of the purchase price. The law defines "first-time home buyer" as a buyer who has not owned a principal residence during the three-year period prior to the purchase.

Move-Up/Repeat Home Buyer Tax Credit - To be eligible for this credit, buyers must have owned and lived in their primary residence for 5 consecutive years in the last 8 year period. The credit is equal to 10% of the home's purchase price to a maximum of \$6,500. To qualify for either credit, taxpayers must sign a sales contract by April 30, 2010 and close of escrow must be completed by June 30, 2010.

Address of home purchased			
Purchase price		Purchase date	
		If you own the property jointly with someone other than a spouse, enter your percentage ownership.	

Check one: First Time Homebuyer Tax Credit Move-Up/Repeat Home Buyer Tax Credit

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	

E. Adjustments to Income

2009 Traditional IRA Contributions		If you previously filed Form 8606 (non-deductible IRA contributions) enter amount on Line 12 of last 8606 of filed				
2009 Roth IRA Contributions		Contributions to Self Employed Retirement Plan made for 2009				
Would you like us to calculate your allowed contribution to	Traditional IRA	Yes	No	Roth IRA	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 December 31				

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

Institution	Amount	Institution	Amount

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

Institution	Box 1a Dividends	Box 1b Qualified 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 and expenses paid for books, supplies and equipment needed for a course of study. Taxpayers may not claim both the deduction and the credit for the same student. Based on the information you provide below, we will determine which provides 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 Other	1 st 2 nd 3 rd 4 th Grad Other	1 st 2 nd 3 rd 4 th Grad Other
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			

Educator Expenses

Classroom expenses incurred by educators teaching kindergarten through 12 th grade	
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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/co-pays	Physician, Dentist, Chiropractor fees/co-pays	
Contacts/Glasses	Lab/Hospital Fees/co-pays	
Insurance Premiums - Do not include pretax	Counseling/Psychotherapy fees/co-pays	
COBRA premiums	Other transportation/lodging costs	
Medical Travel—Miles driven	Other medical expenses	

Q. Small Business/Self-Employed Income

Business Name		Ownership (circle one)	Taxpayer Spouse Joint
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Business address (if different than home address)	
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Gross Income		Supplies	
Income reported to you on Form 1099 (please include copies)		Taxes and licenses	
Returns and allowances		Travel costs	
Advertising		Meals and entertainment	
Bad debts from sales or service		Telephone	
Commissions and fees		Utilities	
Depletion		Wages	
Insurance (other than health)		Other expenses	
Interest		Inventory at the beginning of the year	
Legal & professional services		Purchases less cost of items used personally	
Parking fees, tolls		Cost of labor (do not include your salary)	
Pension and profit-sharing plans		Materials and supplies	
Rent or lease a Vehicles, machinery, equipment		Other costs	
Other business property		Inventory at the end of the year	
Repairs and maintenance		Cost of goods sold	

Other business expenses – additional information

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?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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 commuting		Monthly lease payment	
Number of miles driven for personal use		Was your vehicle available for off-duty hours?	Yes <input type="checkbox"/> No <input type="checkbox"/>

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	

R. 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

S. 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

Hybrid/Alternative fuel vehicles may qualify for a tax credit if purchased after January 1, 2006, for purchases of new hybrid vehicles. Please include a copy of your Manufacturer's Certificate and sales receipt to claim your credit. Plug-in electric vehicles and plug-in electric drive conversion kits may also qualify for this credit. Purchase date: ____/____/____. Make & Model of car: _____

Residential Energy Credits are available for certain energy efficient improvements to a primary residence. Please provide a copy of the manufacturer's certificate and sales receipts if you made the following improvements:

Insulation, energy efficient windows, doors, skylights, heating/air conditioning systems, water heaters, biomass stoves or metal or asphalt roof? Yes No

Alternative energy equipment, such as geothermal heat pumps, wind turbines or solar water heaters? Yes No

T. Crewmember Deductions

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. 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/trip trading fees		Monthly prorated cell fees (line holders)	
Total Union & professional dues	\$	ISP fees (prorated to business use)		Monthly cell fees on reserve	
Work related publications	\$	Layover Internet access 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		Training/Education/Job Hunting	
Dry cleaning		ATM/check cashing fees on layovers		Books	
Epaulets		Batteries		Course fees	
Jacket		Business cards		Dry cleaning/laundry in training	
Hair clips		Cockpit keys/corkscrew/flashlight		Hotel	
Hat		Cockpit supplies (maps etc)		Maintaining/additional ratings	
Laundry		Computer supplies (toner, paper)		Other job-hunting fees/expenses	
Maternity dress		Copying/fax/mailling costs		Proficiency training/simulator time	
Nametags/Wings		Currency converter/Exchange fees		Resume printing/mailling	
Pants		Earpiece (pilots)		Transportation/Parking	
Scarf/		FAA medical certificate		Total job-hunting/Training	\$
Serving garments		Hair dryer/ Curling iron/Clothes iron		Training dates	City
Shirt		ID replacement		Special/Temporary Assignment	
Shoe repair		Loss of license insurance		Commuting/Local transportation/Tips	
Shoe shines		Manuals /Organizer		Dry cleaning/Laundry	
Support hose		Passport/Visa fees and photos		Housing/ Utilities/Phone	
Sweater		Portable security dvc/smoke detector		Shipping/storage	
Tie		Sunglasses (pilots only)		Total Temporary Assignment	\$
Uniform alterations/repair		Upgrade training expenses		Dates	City
Vest		Voltage converter			
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	

U. 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

V. 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

W. State Renters Credit (If you paid rent at your tax address, you may qualify for a renter's tax 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"/>

NJ Residents only, please complete roommate information below:

Roommate's Name	Roommate's Social Security Number	Roommate's Share of monthly rent

X. State Specific Items

	Amount																				
CA	Expenses associated with the purchase and installation of solar energy equipment																				
	If you have a Registered Domestic Partner, please provide name and Social Security Number																				
CT	CT Residents, please provide the following information for your state property tax credit																				
	<table border="1"> <thead> <tr> <th>Property</th> <th>District</th> <th>List or Bill #</th> <th>Date Paid</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Home</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Auto</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Auto</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Property	District	List or Bill #	Date Paid	Amount	Home					Auto					Auto				
Property	District	List or Bill #	Date Paid	Amount																	
Home																					
Auto																					
Auto																					
DC	For DC First Time Home Buyers Credit (first home purchase in DC or , please list: following information																				
	Address of Qualifying home, if different than your address on the front of the organizer																				

DC	Lot Number		Square Number		Closing Date		
	Do you have a carryover credit from 2008?			Percentage of home owned			
DE	Clothing and expenses incurred for service as an active volunteer firefighter						
FL	A state Intangible tax return is required if you own securities valued at more than \$250,000 or \$500,000 if you are married filing jointly. Please include copies of your investment statements with your organizer.						
GA	Amount spent on home care services for persons over 62.						
HI	Cost of child restraint system						
ID	Cost of insulation purchased in 2008 and installed in primary residence						
IN	For installation installed in your primary residence, please list:						
	Age of house		Purchase date		Installation date		Amount paid
MA	Please provide Form 1090HC.						
	Qualified commuter expenses paid for public transportation (MBTA transit/rail, tolls paid through FastLane account)						
	Legally married same sex partners must file as MFJ or MFS. Please include partner's name, Social Security Number and birth date						
MI	Please provide the property tax statement showing the taxable value of your house.						
MN	Please send us your Certificate of Rent Paid (renters) or Statement of Property Taxes Payable (homeowners)						
MT	First Time Homebuyers Savings Account contributions						
OH	Job training expenses you incurred after layoff or furlough						
VT	Please include your 2009/2010 property tax bill						

Y. 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
/ /	/ /	/ /	/ /	/ /	/ /
/ /	/ /	/ /	/ /	/ /	/ /
/ /	/ /	/ /	/ /	/ /	/ /

Privacy Policy

The privacy of your client information has always been important to us, and we have always been bound by professional standards of confidentiality. We collect nonpublic personal information about you that is provided by you or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, tax organizers, worksheets and other documents necessary to provide professional services to you.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by a client.

We restrict access to nonpublic personal information about you to members of our firm who need to know that information in order to provide you professional services. We retain records relating to the professional services that we provide you in accordance with accounting and government standards.

We employ physical, electronic, and procedural security safeguards to protect your nonpublic personal information.

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

Tax Preparation fees

Crew Package Our Best Deal! Married filers: add \$25.00. (Does not include state return)	1040, Schedules A&B, 2106, Per Diem Report	125.00	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)		25.00	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	25.00	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	20.00	Passive activity loss	8582	20.00
Child tax credit		20.00	Rental Property (per property)	E	20.00
Additional child tax credit	8812	20.00	Sale of business assets	4797	40.00
Earned Income Credit	EIC	20.00	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	10.00
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			

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

Please bill my credit card (AmEx Discover, MasterCard, Visa)

I have enclosed a check

Withhold my fee from my refund

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 \$125.00 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, 2009 and are subject to change thereafter.