

Bookkeeping Solutions

"A Full Charge Bookkeeping Service"

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2007

Tax Organizer EZ

Tax season can be stressful. We're trying to help. You can use this packet to organize the information we need for preparation of your 2007 personal income tax return. There are simple questions for you to answer that will help us better understand your tax situation. The questions should also help you consider what additional information to bring with you when having your tax return prepared.

Checklist of information to bring:

- Your Driver's License & Social Security Card (for identity verification)
- Copy of your 2006 income tax return (for comparison & double-checks)
- Preprinted IRS mailing label (if you received one)
- Any letters you may have received from the IRS or the state DOR since your 2006 returns were filed

- Original W-2s and other statements of income received from employers
- 1099s and other statements reporting interest/dividend/miscellaneous income
- Records of other income received (tips, self-employment, SSI, combined bank reporting statements)

There are numerous adjustments, deductions, and credits you may be able to claim which are not available when filing short form. If the following apply, you may wish to consider filing long form:

- | | |
|--|-------------------------------------|
| Moving expenses relating to a change in work | You own your home or other property |
| Contributions made to a Health Savings Account (HSA) | You incurred high medical costs |
| Contributions made to an IRA or §401(k) plan | You gave generously to charities |
| You attended classes or paid on a student loan | Unreimbursed work-related expenses |

If the following situations apply to you, you may be required to file long form.

- | | |
|--|--|
| Alimony or maintenance paid or received | You claim children or other dependents |
| Advanced Earned Income Credit received throughout the year | Self employment income |
| Household employees (Gardener, Housekeeper, Nanny, etc.) | |
| Income from tips not reported to your employer | |

If you find you need the long-form version of this organizer, you can download and print it from our website (<http://bookkeeping.lawsonmo.net/>) or just drop by our office to pick one up.

Notes:

Privacy Statement

Because much of the information you provide to us during preparation of your income taxes is highly sensitive, nonpublic personal information, we'd like to present you with our privacy policy up front stating what information we collect, how we use it, and how we protect it.

What We May Collect

- Contact information such as addresses and phone numbers
(While this information may be publicly available in published directories, we are restricted from sharing it because it has been collected in the process of providing financial services. As such, federal regulations declare it to be protected information.)
- Identifying information such as names, social security numbers, and dates of birth
- Banking information such as account numbers, balances, deposit amounts and payments

Where We Collect This Information

- From interviews with you regarding your tax situation
- From applications and organizers (such as this packet)
- From tax and income documents you provide to us

How Your Information Is Used

- We do not disclose any nonpublic personal information about our tax customers or former customers to anyone except as requested by our customers or as required by law.
(Tax customers are mentioned specifically here because our accounting clients receive a separate privacy statement allowing them to give authorization for us to contact third parties in order to collect and/or verify information on their behalf.)
- We restrict access to nonpublic personal information concerning you, except to employees who need access to such information as part of their job duties in order to provide products or services to you.

How We Protect Your information

- We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.
- We maintain storage of your information in locations away from public access. Work is always covered while it is out from storage when not actively being used to prevent accidental viewing.
- We prefer to work with copies of your information and return originals to you for your own safe keeping. Any physical document not returned to you (including notes, printouts, reports and copies of documents) which display protected information are shredded once they are no longer needed or after standard retention requirements.
- Our computer networks are equipped with strong encryption methods to prevent interception. We maintain a strong hardware firewall on our Internet connection as well as software firewalls on each computer to prevent intrusion into our network.
- Access to your information is limited to those performing work on your tax return. We do not tolerate browsing through records. We only access your information when it is needed for working on your return, whether that information is in computer records or on physical paper documents.

While these policies have naturally been in place within us, we have gone to great lengths in reviewing them to see that they are in compliance with federal regulations. We were also glad to review our policies in order to present them for your review. We feel it is important for you to know *how* we protect the information you've entrusted to us, instead of just telling you that we do.

Basic Information

	First Name	MI	Last Name	Suffix	SSN	Date of Birth	Occupation	\$3 to Presidential Election Fund?	ID
Taxpayer					- -	/ /		<input type="checkbox"/>	<input type="checkbox"/>
Spouse					- -	/ /		<input type="checkbox"/>	<input type="checkbox"/>

(Note: If you have children or dependents, are age 65+ or blind, you may not file short form)

Did your marital status change during 2006 or 2007? _____

Expected Filing Status: Single Married filing jointly **(If other than these, you may not file short form)**

Could you possibly be claimed as a dependent on another person's return? Taxpayer Spouse No

Address: _____

Returning Clients: Same as last year

Phone #s Taxpayer Spouse
 Daytime: _____
 Evening: _____
 Cell: _____

County: _____ Resident State: _____

School District: _____ Best time to call: _____

Email address(es): _____

Did you reside in more than one state during 2007? _____

Did you earn income from a state other than the one you live in? _____

Did you earn interest from, or are you an authorized signature holder on a foreign bank account? _____

Did you have, income from, pay taxes to, or reside in a foreign country? _____

Income

Number of W-2s Received – Taxpayer: _____ Spouse: _____

If you were unable to obtain a W-2 from an employer, bring your last paystub with you.

(Note: If your W-2 shows an amount in boxes 8, 9, 10, or 12 you cannot file short form)

Number of 1099-INT forms received – Taxpayer: _____ Spouse: _____

Was your interest income greater than \$1500.00? Yes No **(If yes, you cannot file short form)**

Unemployment Income: _____ Combat Pay: _____

Please bring all of the above forms and information with you to your appointment.

- There are several other types of income that would prevent you from filing short form, including:**
- Capital Gains (from sale of stocks or property)
 - Dividends From Investments (1099-DIV)
 - Prizes & Gambling Winnings (1099-MISC or W-2G)
 - Long Term Care Benefits (1099-LTC)
 - Debts Canceled Outside of Bankruptcy (1099-C)
 - Scholarships (if taxable or when used for certain expenses)
 - Tips that were not reported to your employer
 - Business Income (from self employment)
 - Alimony or Maintenance Received
 - Income from Rental Property
 - Farming Income
 - Retirements & Pensions (1099-R)
 - Disability Income (1099-G)

Payments & Refunds

**On short-form, the only payment considered is your withholdings shown on your W-2s.
If you have made other payments to the IRS for 2006, you may not file short form.**

Earned Income Credit (EIC)

- Did your income from working amount to less than \$12,590 (\$14,590 if married filing jointly)? Yes No
Can you or your spouse be claimed as a dependent on another person's return? Yes No
Are either you or your spouse between the ages of 25 and 65? Yes No
Did you have investment income greater than \$2900 during 2007? Yes No

- Where you a non-resident alien for any part of the year? Yes No
Was your (and your spouse's) primary home within the US for more than half the year? Yes No
Have you ever been disqualified for the EIC? (also called "Earned Income Tax Credit" in IRS letters) Yes No

Refund or Balance Due

For Direct Deposit of a refund or direct payment of balance due, bring a voided check so we may verify your bank account information and transmit it with your return to the Internal Revenue Service and to the Missouri Department of Revenue.

The IRS now allows you to split your refund into multiple accounts when using Direct Deposit. The IRS also allows you to pay a balance due by check or automatic debit with your return, or using a credit card through an authorized payment processor. If you are not able to pay the full amount, you may request installment payments allowing you to meet your tax obligations on extended terms, however you may still be charged penalties and interest on the remaining amount of taxes not paid by the filing deadline.

Be advised, The IRS is now converting any paper checks they receive into electronic bank transfers.

Note: *The State of Missouri only allows for Direct Deposit of refunds into a single bank account. State refunds may not be split into multiple accounts like the federal refund allows for. The State of Missouri also allows Direct Deposit only with e-filed returns.*

Missouri

Missouri has several trust funds that you can donate part or all of your state refund toward:

- | | | |
|--|---|--|
| <input type="checkbox"/> Children's Trust | <input type="checkbox"/> Elderly Home Delivered Meals | <input type="checkbox"/> Veteran's Trust |
| <input type="checkbox"/> MO National Guard | <input type="checkbox"/> Childhood Lead Testing | <input type="checkbox"/> Workers' Memorial |
| <input type="checkbox"/> MO General Revenue Fund | <input type="checkbox"/> MO Military Family Relief Fund | |

We'll confirm actual amounts with you upon final review of your return before filing.