

Tax Organizer 2009

Please include the following items:

- Signed Letter of Confidentiality and Responsibility (see next page).
- W-2s and 1099s.
- 1099s for Dividends, Interest, Retirement, Social Security, Disability, Unemployment, Gambling Winnings, Sales of Stock and Bonds (if any sales are reported, we will need dates purchased and cost basis). Please make note of any taxable income where 1099s were not received, such as alimony.
- Schedule K-1s from partnerships, estates and trusts, or S corporations.
- Year-end statement of mortgage interest (Form 1098), escrow activity, balance on mortgage or home equity loans, and real estate taxes paid.
- If you bought, sold, or refinanced real estate, a closing statement for each transaction.
- Any year-end statements provided to you by retirement accounts.
- A list of any unreimbursed employee expenses.
- All legal documents for formation, sale, or purchase of a business during the year.
- All legal documents for divorce decrees.
- List of all charitable contributions (to whom, amount, and description).
- Rental income and expenses.
- List of all medical expenses paid out of pocket and not reimbursed by health insurance.
- All income information for children if you'd like us to prepare their returns.
- New clients:** copies of prior federal returns (at least one year, preferably three).

Mailing address:

First American Financial Services, Inc.

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Clearwater, FL 33761

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Letter of Confidentiality and Responsibility

First American Financial Services, Inc. (FAFS) will prepare your tax returns from the information you provide. All information you provide relating to the preparation of your returns is confidential and shall not be disclosed to any person except to those specifically authorized by you or as is required by law.

It is your responsibility to provide us with all the information required to prepare complete and accurate returns. We will not audit or otherwise verify the data you submit, although we may ask for clarification. You, therefore, specifically confirm to us that all items have been disclosed and that you have written records to support all items claimed (receipts, cancelled checks, diaries, logs, etc.).

Since the final responsibility for the completeness and accuracy of the returns is yours, you agree to review them carefully to fully acquaint yourself with all items contained therein to ensure that there are no omissions or misstatements before you sign them.

It is important for you to know that the law imposes a penalty if a taxpayer makes a substantial understatement of tax liability. You should also know that the IRS audit procedures will almost always include questions on deductions that require documentation, such as travel and entertainment expenses. In preparing your returns, we rely on your representations that we have been informed of all bartering transactions and that you understand and have complied with the documentation requirements for your expenses and deductions.

Any material you furnish for use in preparing your returns will be returned to you at the completion of your returns. If the returns are examined by taxing authorities, requests may be made for supporting documentation. Therefore, we recommend that you retain all pertinent records for at least seven years.

If the tax services and terms outlined above are in accordance with your understanding of our engagement, please sign this letter in the space provided. All provisions and conditions of this letter will remain in effect while you are a client of FAFS. We appreciate the opportunity to serve you.

Very truly yours,
First American Financial Services, Inc.

I (We) have submitted information to FAFS for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, cancelled checks, or other documents. This information is true, correct, and complete to the best of my (our) knowledge.

Accepted by:

By: _____ Date: _____
(Taxpayer)

By: _____ Date: _____
(Spouse)

Personal Information

Taxpayer Information

Last: _____ First: _____ SS#: _____
 Date of Birth: _____ Occupation: _____
 Home Ph: _____ Other Ph: _____ Email: _____
 Address: _____
 City: _____ State: _____ Zip: _____

Spouse Information

Last: _____ First: _____ SS#: _____
 Date of Birth: _____ Occupation: _____

Family Dependents

List all persons who lived in your home and anyone living outside your home that you supported during the year.

Name	Birth Date	SS#	Relationship	Months live with you	Provide > 50% support?

*If dependent is in college, indicate what year of college.

Questions that could lead to deductions

Questions that could lead to deductions	Yes	No
Are either you or your spouse legally blind?		
Did your spouse pass away within the last two years? If yes, date of death:		
Did you contribute money to an IRA last year? If so, what type/how much?		
Can someone else claim you or your spouse as a dependent on their tax return?		
Were any children adopted last year?		
Do you have any children with investment income greater than \$1,900?		
Do you or your spouse receive payments from a pension or profit sharing plan?		
Do you or your spouse make contributions to a Health Savings Account? If yes, how much?		
Did you or your spouse receive tip income not reported to your employer?		
Did you or your spouse pay or collect alimony during the tax year?		
Did you pay for child care so you could work? If yes, provider name, address, and tax ID.		
Did you or family member attend college/vocational school and incur educational expenses?		
Did you or anyone in your family pay student loan interest?		
Did you buy or sell any stocks or bonds during the tax year?		
Did you incur any casualty or theft losses during the tax year?		
Did you incur any job related moving expenses during the tax year? If yes, attach details.		

Did you purchase a new home during the tax year?		
Did you start a business or acquire interest in a partnerships or S corps during the tax year?		
Did you purchase rental property during the tax year?		
Did you maintain a home for someone not claimed as a dependent?		
Did you make any energy efficiency improvements to your principal residence?		
Did you purchase and pay sales tax on any large items? If yes, need sales tax info.		
Did you purchase an electric (plug in) vehicle this year?		
Have you ever made a non-deductible IRA contribution?		
Did you make any rollover or withdrawals from any retirement account?		
Did you receive any lump sum payments from a pension or profit sharing plan?		
Did your college student receive educational benefits (scholarship, grant, reduced tuition)?		
Did you have any unreimbursed employee business expenses? If yes, need list.		
Did you make any charitable donations? If yes, names and amounts.		
Did you have any medical expenses not reimbursed by insurance?		
If you receive Soc Sec, RR retirement, or Veteran's disability, did you receive a \$250 check?		
Did you pay union or professional dues?		
Did you pay for a safety deposit box?		

Estimated Income Tax Payments (amount and date of payments)		
First Quarter		
Second Quarter		
Third Quarter		
Fourth Quarter		

E-File Information	YES	NO
Do you want to have your tax return filed electronically?		
Do you wish to Direct Deposit any refunds? If yes, need bank information below:		
Direct Deposit to Checking or Savings?		
Routing Number:		
Account Number:		

