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**Tax Return Appointment**

Date:  
 Time:  
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2008 tax return. Please add, change, or delete information as appropriate.

**CLIENT INFORMATION**

Filing Status	Filing status (table) . . . . .	2	<p align="center"><b>Filing Status</b></p> <p>1 = Single                  2 = Married filing joint                  3 = Married filing separate                  4 = Head of household                  5 = Qualifying widow(er)</p>
	1=married filing separate and lived with spouse. . . . .		
	Year spouse died, if qualifying widow(er) (2006 or 2007). . . . .		
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 . . . . .		
Foreign Address	ZIP code . . . . .		
	Region . . . . .		
	Postal code . . . . .		
	Country . . . . .		

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Client Information (continued)

1 p2

Please add, change or delete information for 2008.

CLIENT INFORMATION

Taxpayer Contact Information	Home phone.....	
	Work phone.....	
	Work extension.....	
	Daytime phone (table).....	1
	Mobile phone.....	
	Pager number.....	
	Fax number.....	
	E-mail address.....	
Spouse Contact Information	Home phone.....	
	Work phone.....	
	Work extension.....	
	Daytime phone (table).....	1
	Mobile phone.....	
	Pager number.....	
	Fax number.....	
	E-mail address.....	

Daytime Phone

- 1 = Work
- 2 = Home
- 3 = Mobile

1 p2

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**Please add, change or delete information for 2008.**

**DEPENDENTS**

	Dependent	Dependent	
First name .....			<p><b>Type of Dependent</b></p> <p>1 = Child living w/taxpayer                  2 = Child not living w/taxpayer                  3 = Dependent other than child                  4 = Head of household only, not a dependent                  5 = Earned income credit only, not a dependent</p>
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			
	Dependent	Dependent	<p><b>Earned Income Credit</b></p> <p>1 = When applicable (default)                  2 = Student age 19 to 23                  3 = Disabled age 19 or older                  4 = Force                  5 = Suppress</p>
First name .....			
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			
	Dependent	Dependent	
First name .....			
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			
	Dependent	Dependent	
First name .....			
Last name .....			
Title/suffix .....			
Date of birth (m/d/y) .....			
Social security number .....			
Relationship .....			
Months lived at home .....			
Type of dependent (see table) .....			
Earned income credit (see table) .....			
Claimed by: 1=taxpayer, 2=spouse .....			

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**IMPORTANT:** Please answer each question. **If you do not check "yes" or "no", we will presume that the answer is "no."**

**If there are any additional organizer pages that you need that were not supplied with this organizer, please go to [www.hkmscpa.com](http://www.hkmscpa.com). On the home page click on "2008 individual tax organizer", locate the page that you want, and print it.**

If we did not prepare your tax return last year and you have not given us your returns for the past three years, please provide them with this organizer.

**CHANGES ON EXTENSIONS:** 1040 for six months to 10/15, 1120 for six months to 09/15, 1120S for six months to 09/15, 1065 for **FIVE** months to 09/15, and 1041 for **FIVE** months to 09/15.

#### PERSONAL INFORMATION

Yes      No



Did any of your personal information in the Client Information section of the Organizer change? If YES, write in the new information. Make sure you check your e-mail address for accuracy. **We prefer to use e-mail for the majority of our communications. If further information is needed for the preparation of your return, you will be notified by email. Please check your e-mail regularly.**

#### ELECTRONIC FILING, ETC



Do you want to file your tax return **electronically**?



Do you want your **refund deposited directly** to your bank account? If YES, attach a voided check here.



May the IRS discuss the tax return with your preparer?



Did you have an interest or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? If YES, provide the country's name and any other details of the income from that account in 2008.



Did you receive a distribution from, or were you a grantor to a foreign trust? If YES, provide the income information from that trust for 2008.

#### DEPENDENTS



I have enclosed all of my children(s) tax documents with this organizer to have their returns prepared.



Were any children born to you during 2008? If YES, write the child's full name, date of birth, and social security number in the space below this question.



Did your parent(s) become your dependents during 2008? If YES, write their full name, date of birth, and social security number in the space below this question and provide a copy of their 2008 tax return.



Did any of your prior year dependents die during the year? If YES, write their date of death in the Dependents section of the Organizer beside their name.

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Did any of your prior year dependents get married during 2008? If YES, cross out their name in the Dependents section of the Organizer and write "Married in 2008" next to their name.

L   Did any of your prior year dependents graduate from high school in 2008 and **NOT** go on to college? If YES, write next to their name, in the Dependents section of the Organizer, "Graduated from high school in 2008 and did not go to college." **This is the last year that you can claim them as a dependent-make sure that they do not claim themselves as a dependent on their own tax return for 2008.**

Did any of your prior year dependents graduate from college in 2008? If YES, write next to their name, in the Dependents section of the Organizer, "Graduated from college in 2008." **This is the last year that you can claim them as a dependent-make sure that they do not claim themselves as a dependent on their own tax return for 2008.**

Did you adopt any children in 2008? If YES, write the child's full name, date of birth, and social security number, and the amount of adoption expenses paid in the space below this question.

Was this child adopted from outside of the United States? To the right of this question, write the country's name.

Was the adopted child a "special needs child" as defined by Washington State law?

Did you have any children under the age of 19 or full-time students under the age of 24 at the end of 2008 with interest and dividend income in excess of \$900 or total investment income in excess of \$1,800? If YES, provide us with ALL of their tax information, as we require that we prepare this return due to the complexity of the tax laws.

**INCOME**  
Did you work outside of the United States during 2008? If YES, provide, on the additional information page of the organizer, the income amounts you were paid for 2008, any foreign withholding or income taxes paid for 2008, and the dates that you worked outside the United States during 2007 and 2008, and the dates you expect to work outside the United States in 2009.

Did you receive Social Security payments in 2008? If YES, provide your 2008 Social Security **Form SSA-1099**.

Did you receive Unemployment Compensation payments in 2008? If YES, provide your 2008 **Form 1099-G**.

Did you receive Gambling Winnings payments in 2008? If YES, provide your 2008 **Forms W-2G**.

Did you receive a State Tax Refund from a state outside of Washington in 2008? If YES, provide your 2008 **Form 1099-G**.

Did you own, purchase, or sell an interest in a partnership or "S" corporation in 2008? If YES, provide the **Forms 1065 K-1 or 1120S K-1**.

Were you a beneficiary in a trust in 2008? If YES, provide the **Forms 1041 K-1**.

Did you have any debts that were forgiven in 2008 such as credit card or mortgage debt on a home foreclosure or sale? If YES, provide the **Forms 1099** that were sent to you for this purpose. **(F982-S62)**

Did you file bankruptcy in 2008?

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## Miscellaneous Questions

## RETIREMENT PLAN DISTRIBUTIONS

- If you are older than 70-1/2, did you take the required minimum distributions from your retirement accounts during 2008?
- Did you withdraw funds from a retirement account (401k, IRAs, etc.) during 2008? If YES, provide the **Forms 1099R** for the distributions.
- If you did withdraw funds from a retirement account during 2008, did you **roll over** any of these amounts to **another IRA retirement account**? If YES, write the amount here \_\_\_\_\_ and circle the type of account it was rolled into a ROTH IRA or REGULAR IRA.
- Did you receive a Form 1099R for a retirement plan distribution that was due to someone's death (code 4 in box 7 on the form)? If YES, provide the information from the executor of the estate (if you have not already done so) letting us know how much of the estate taxes (presuming estate taxes were due and payable) from the decease's estate would be deductible by you on your tax return.

## IRA and "SELF EMPLOYED 401K" CONTRIBUTIONS

- Do you (taxpayer) plan to or did you contribute to an **IRA** for 2008? If YES, write the amount here \_\_\_\_\_. These contributions must be made before April 15.
- Do you (spouse) plan to or did you contribute to an **IRA** for 2008? If YES, write the amount here \_\_\_\_\_. These contributions must be made before April 15.
- Do you (taxpayer) plan to or did you contribute to a **ROTH IRA** for 2008? If YES, write the amount here \_\_\_\_\_. These contributions must be made before April 15.
- Do you (spouse) plan to or did you contribute to a **ROTH IRA** for 2008? If YES, write the amount here \_\_\_\_\_. These contributions must be made before April 15.
- Do you (spouse) plan to or did you contribute to a **SEP IRA, SIMPLE IRA, or a SELF EMPLOYED 401K** for your business for 2008? If YES, write the **amount** here \_\_\_\_\_, or circle **MAXIMUM** here. These contributions must be made before the tax return is filed or before October 15 if a 1040 extension is filed or before September 15th if a corporate or partnership tax return is filed.

## COLLEGE, HIGHER EDUCATION COSTS

- Did you cash in Series EE US savings bonds issued after 1989 and pay higher education expenses for yourself, your spouse, or your dependents? If YES, please provide the **Form 1099-INT** for those bonds.
- Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program in 2008? If YES, provide the **Form 1099-Q**.
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend college, university, or vocational school in 2008? If YES, provide the **Form 1098-T**. What year are they in college, university, or vocational school as of 2008-- \_\_\_\_\_?
- Did you pay student loan interest in 2008? If YES, provide us with the **Form 1098-E** or the **letters** stating the interest paid.

## ADJUSTMENTS TO INCOME

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Were you an educator in 2008 who paid out-of-pocket expenses for your classroom that were not reimbursed by the school? If YES, write the total amount here \_\_\_\_\_.

Did you pay alimony or spousal maintenance in 2008? If YES, write the total amount here \_\_\_\_\_.

**SCHEDULE A - ITEMIZED DEDUCTIONS****MEDICAL EXPENSES**

Did you pay for medical insurance as a self employed person in 2008? If YES, write the amount here \_\_\_\_\_.

**Note about self-employed medical insurance and expenses: these expenses can be deducted as a business expense IF you have adopted a qualified IRS Section 105 medical reimbursement plan that is available for sole proprietorships, some partnership, and "C" corporations ("S" corporation are exempt from this type of plan.) If you would like more information about this type of plan and how it can save you taxes, please check the "YES" box. We will mail information to you and give you a call about a Section 105 plan for your business.**

Did you pay for hospice, adult care home for medical care purposes, nursing care, long-term care insurance costs, medical insurance costs, or out-of-pocket medical costs that were not reimbursed by Medicare or any other insurance? If YES, provide, on the additional information page of the organizer, a list with totals of those expenses.

Did you pay for medical expenses out of your own pocket for an elderly parent? If YES, provide, on the additional information page of the organizer, all of the details and amounts paid **and a copy of their tax return** for 2008.

Did you make contributions to a health savings account (HSA) or a medical savings account (MSA)? If YES, provide, on the additional information page of the organizer, amount contributed in 2008 and any forms received from these accounts showing payments made on your behalf.

**TAXES**

State income tax-Did you move into Washington State in 2008? If YES, provide **a copy of your 2007 state income tax return** from your previous state.

Auto excise tax-Did you provide us with the excise tax, RTA tax, or monorail tax amounts from your vehicle, motorcycle, or boat registration statements for 2008? Write these amounts in the "Taxes" section in the Organizer under personal property taxes.

Sales tax on large purchases-Did you purchase a vehicle, a boat, a plane, or have your home remodeled in 2008? If yes, write the amount of sales tax paid on these items in the "Taxes" section in the Organizer under Sales tax paid on vehicles, boats, and aircraft. Purchases of furniture and other personal items do not qualify unless you add up the sales tax on all of your purchases for 2008.

General sales tax-If you wish to add up the sales tax paid on all of your purchases, including the large items in the question above, in 2008, check YES to the left and write the amount in the "Taxes" section in the Organizer under State and local sales taxes paid. Otherwise, check NO to the left and we will use the standard sales tax deduction based on your income from the IRS tables.

Labor and Industries Insurance (SDI)-Does your employer deduct labor and industries insurance from your payroll check? If YES, write the amount in the "Taxes" section in the Organizer under Other taxes and label it as "L&I" or "SDI".

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**Real estate taxes**

- Personal residence**-In the "Taxes" section in the Organizer under Real estate taxes - principle residence write the amount of real estate taxes that you paid in 2008. If you owned multiple personal residences during the year, circle or write the property address on each **mortgage interest statement or the real estate tax statement**. THIS YEAR YOU ARE ALLOWED TO DEDUCT A PORTION OF YOUR REAL ESTATE TAXES EVEN THOUGH YOU CANNOT ITEMIZED YOUR DEDUCTIONS, SO PLEASE PROVIDE THE AMOUNT TO US.
- Vacation home, raw land, or time-share** -Do you own any of these? If YES, write in the "Taxes" section in the Organizer under Real estate taxes - property held for investment the amount of real estate taxes that you paid in 2008 for each property and circle or write a description on each **mortgage interest statement** (vacation home, time-share, raw land).
- Rental real estate**-Did you own rental real estate holdings during 2008? If YES, provide the amount of real estate taxes that you paid in 2008 for each property. Write the address or location of the property on each real estate tax statement. Write "**RENTAL**" on each rental property statement.

**INTEREST****Mortgage interest**

- Personal residence**-Are you a **first-time home buyer** (someone who has not owned a home in the three years prior to the purchase date) in 2008 after April 9, 2008 and before July 1, 2009? If yes, please provide us with the purchase closing or settlement statement for the home.
- Personal residence**-Did you own only a personal residence during 2008? If YES, provide the **mortgage interest statements** for all of your mortgages for the entire year: first, second, third, etc mortgages. If you owned multiple personal residences during the year, circle or write the property address on each **mortgage interest statement**.
- Vacation home, raw land, or time share**-Did you own any of these properties during 2008? If YES, provide the **mortgage interest statements** for all of your mortgages for the entire year: first, second, third, etc mortgages. Circle or write a description on each **mortgage interest statement** (vacation home, time share, raw land).
- Rental real estate**-Did you own rental real estate holdings during 2008? If YES, provide the **mortgage interest statements** for all of your rental property mortgages for the entire year: first, second, third, etc mortgages. Circle or write the property address on each **mortgage interest statement** and write "**RENTAL**" on the face of the statement.
- Private mortgage insurance**-If you bought or refinanced a home in 2008 and you paid for private mortgage insurance, please provide the documents that state how much you were charged for this insurance.

**Refinance of home mortgage**

- Personal residence**-Did you refinance your personal residence during 2008? If YES, provide the **two-page closing/settlement statement**.
- Vacation home, raw land, or time share**-Did you refinance any of these properties during 2008? If YES, provide the **two-page closing/settlement statement**.
- Rental property**-Did you refinance a rental property during 2008? If YES, provide the **two-page closing/settlement statement**.

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**Purchase of home**

- Personal residence**-Did you purchase a personal residence during 2008? If YES, provide the **two-page closing/settlement statement** of the purchase.
- Vacation home, raw land, or time share**-Did you purchase any of these properties during 2008? If YES, provide the **two-page closing/settlement statement** of the purchase.
- Rental property**-Did you purchase a rental property during 2008? If YES, provide the **two-page closing/settlement statement** of the purchase.

**NON-CASH CHARITABLE CONTRIBUTIONS**

- Did you drive vehicle miles for charitable purposes (does not include going to and from church etc. on service days) including choir practice or meetings? If YES, write the total miles in the "Cash contributions" section of the organizer under number of charitable miles.
- Did you travel for charitable purposes where the expenses were not reimbursed including missions trips out of the country? If YES, write the total amount of air fare, meals, etc. in the "Cash contributions" section of the organizer under volunteer expenses.
- Did you donate a vehicle to a charitable organization in 2008 that had a value of less than \$500? If YES, write the value of the vehicle, the date of the donation, and the name of the organization in the "non-cash contributions" section of the organizer.
- Did you donate a vehicle to a charitable organization in 2008 that had a value of more than \$500? If YES, provide the **Form 1099C** issued by the charity.
- Did you donate stock or property to a charitable organization in 2008? If YES, write a description of the donation, the value of the stock or the property at the time of the contribution, and the date of the donation in the "non-cash contributions" section of the organizer and provide the **letter of the donation** issued by the charity.
- Did you donate clothing or household goods to a charity in 2008? If YES, write the name of the organization and the thrift store value of the items donated in the "non-cash contributions" section of the organizer. Do not give us your receipts.

**CASUALTY OR THEFT LOSS**

Casualty or theft losses include a fire in your home or theft of property (your grandmother's jewelry that you had appraised) that exceeded your insurance reimbursement and, in addition, exceeded 10% of your income for 2008. For example: if your home burned down and the insurance company valued your contents to have a current market value on eBay of \$150,000, but you had a maximum replacement coverage of \$100,000, then you could deduct the \$50,000 loss subject to a limitation of 10% of your income.

- Did you have a casualty or theft loss that was not reimbursed by your insurance company that exceeded 10% of your income in 2008? If YES, provide, on the additional information page of the organizer, **all of the details and the insurance paperwork**.

**MISCELLANEOUS ITEMIZED DEDUCTIONS**

- Did you drive your personal vehicle for business purposes for your employer (does not include commuting to and from work)? If YES, provide, on the additional information page of the organizer, your **business auto miles and total auto miles** (including personal) for each vehicle used for business. Please show the miles for each vehicle separately.
- Did you pay for any of the following items? If YES, write in the titles and amounts in the "Miscellaneous Deductions" section in the Organizer.

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- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | union dues,   |
| <input type="checkbox"/> | <input type="checkbox"/> | professional dues, licenses, liability insurance, and subscriptions,  |
| <input type="checkbox"/> | <input type="checkbox"/> | purchase and cleaning of work uniforms and safety clothing and shoes,   |
| <input type="checkbox"/> | <input type="checkbox"/> | purchase of tools required for work,  |
| <input type="checkbox"/> | <input type="checkbox"/> | cell phone required by the employer,  |
| <input type="checkbox"/> | <input type="checkbox"/> | IRA trustee fees,   |
| <input type="checkbox"/> | <input type="checkbox"/> | investment advisory fees,   |
| <input type="checkbox"/> | <input type="checkbox"/> | safety deposit box rental fees,   |
| <input type="checkbox"/> | <input type="checkbox"/> | tax preparation and planning fees,  |
| <input type="checkbox"/> | <input type="checkbox"/> | job search costs and related travel costs that were not reimbursed,   |
| <input type="checkbox"/> | <input type="checkbox"/> | education expenses required for work that do not qualify you for a new profession unless you are a teacher,       |
| <input type="checkbox"/> | <input type="checkbox"/> | travel and living costs while away from home less reimbursements (per diem),                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | employee business expenses or business meals and entertainment that were not reimbursed by your employer,         |
| <input type="checkbox"/> | <input type="checkbox"/> | gambling losses, or   |
| <input type="checkbox"/> | <input type="checkbox"/> | IRA investment losses only if the entire IRA has been withdrawn and closed for non-deductible IRAs and Roth IRAs. |

**SALE OF ASSETS - CAPITAL GAINS (NON-IRA ACCOUNTS)**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <p><u>Stock, options, or mutual fund sales</u>-Did you sell any stocks, bonds, or mutual funds in 2008? If YES, provide us with your 2008 <b>Form 1099-B statements</b> from each mutual fund or brokerage firm.</p>         |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>If the sale does <b>not</b> show the <u>stock's or bond's cost basis</u>, then provide, on the additional information page of the organizer, <b>the original number of shares purchased and the date of purchase</b>.</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>If the sale does <b>not</b> show the <u>mutual fund cost basis</u>, then provide, on the additional information page of the organizer, <b>the annual mutual fund detail statements since the date of purchase</b> .</p>   |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>If you had <b>stocks or bonds that became worthless</b> during the year, please write the purchase and sale information on the page for capital gains and losses.</p>   |

**Sale of property**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <p><u>Personal residence</u>-Did you sell your <u>personal residence</u> during 2008? If YES, provide the <b>two-page closing/settlement statement of the sale as well as the purchase and a list of capital improvements</b> made to the property since it was purchased.</p>              |
| <input type="checkbox"/> | <input type="checkbox"/> | <p><u>Vacation home, raw land, or time share</u>-Did you sell any of these properties during 2008? If YES, provide the <b>two-page closing/settlement statement of the sale as well as the purchase and a list of capital improvements</b> made to the property since it was purchased.</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p><u>Rental property</u>-Did you sell any rental properties during 2008? If YES, provide the <b>two-page closing/settlement statement of the sale as well as the purchase</b>.</p>   |

**Installment sales**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you sell property on an installment sale <u>During</u> 2008? If YES, write the name of that property to the right of this question and provide <b>a copy of the sale contract, a copy of the installment note, and a copy of the loan amortization schedule</b>.</p> |
| <input type="checkbox"/> | <input type="checkbox"/> | <p>Did you sell property on an installment sale <u>in a year prior to</u> 2008? If YES, provide <b>the amount of principle and interest you collected</b> in 2008 on the installment note.</p>  |

2008

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US

Miscellaneous Questions

**BUSINESS OFFICE OR STORAGE SPACE IN THE HOME**

- Did you use business office and/or storage space in the home? If YES, provide the following data.
- Home insurance paid in 2008 \_\_\_\_\_.
- Utilities - electric paid in 2008 \_\_\_\_\_
- Utilities - gas paid in 2008 \_\_\_\_\_
- Utilities - water paid in 2008 \_\_\_\_\_
- Utilities - garbage paid in 2008 \_\_\_\_\_
- Rent - if you do not own a home, the amount of rent paid in 2008 \_\_\_\_\_
- Total square feet of home \_\_\_\_\_
- Total square feet used as office/storage space \_\_\_\_\_
- Repairs made directly to the office/storage space \_\_\_\_\_

**BUSINESS EXPENSES FOR A SOLE PROPRIETORSHIP, C CORPORATION, S CORPORATION, OR PARTNERSHIP**

- Did you start a business during 2008? If YES, see the top of page one of this organizer to obtain the organizer form from our web site.
- Did you drive your personal vehicle for business purposes (not commuting to and from work)? If YES, provide your **business auto miles and total auto miles** (including personal) for each vehicle used for business. Please show the miles for each vehicle separately.

Total miles Vehicle #1 \_\_\_\_\_ Business miles Vehicle #1 \_\_\_\_\_

Total miles Vehicle #2 \_\_\_\_\_ Business miles Vehicle #2 \_\_\_\_\_

Interest paid on Vehicle #1 \_\_\_\_\_ Interest paid on Vehicle #2 \_\_\_\_\_

Lease payments on Vehicle #1 \_\_\_\_\_ Lease payments on Vehicle #2 \_\_\_\_\_

- Did you **trade in a business vehicle or equipment** during 2008? If Yes, provide us with the trade-in/purchase documents.
- If you have any **vehicle or equipment loan balances** at year end, please provide us with documents showing the loan balances at year end and the interest paid for the year.
- Did you have off-the-road usage of fuel (not in boats) such as generators or equipment? If yes, please write the number of gallons here \_\_\_\_\_ and circle GAS or DIESEL (F4126 S ).
- Did you have employee tips that you reported on your W-2s? If yes, please write the amount of tips reported on the W-2s here \_\_\_\_\_ (F4137 S ).
- Did you sell or purchase business assets during 2008? If YES, **mark on the related organizer pages** the sale and purchase of business assets during 2008.
- Did you keep your bookkeeping on **QuickBooks** during 2008? If YES, provide a **backup copy (QBB) of your QuickBooks file** for 2008. You can put this on a 3.5" floppy disk, a CD ROM, or email the backup (QBB) file to us.
- Did you keep your bookkeeping on **Quicken** during 2008? If YES, **print your Income and Expense report by category** for 2008 and provide it to us with this organizer. If you have mixed personal and business expenses on the report, **yellow highlight those categories that are business expenses**.

<b>2008</b>	<b>1040</b>	<b>US</b>	<b>Miscellaneous Questions</b>
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Did you keep your books by hand? If YES, provide a **handwritten list of income and expenses** (totals only) on the additional information page of the organizer or on the organizer page for businesses.

**RENTAL INCOME AND EXPENSES**

Did you rent a part of your home to someone in 2008? If YES, complete the **organizer page for rental income and expenses**. See the top of page one of this organizer to obtain the organizer form from our web site.

Did you own a rental home in 2008? If YES, complete the **organizer page for rental income and expenses**. See the top of page one of this organizer to obtain the organizer form from our web site.

**Commonly missed rental expenses**

- |  |  |   |
|--|--|---|
| <input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/> | <input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/><br><input type="checkbox"/> | Auto miles traveling to and from the rental home for repairs or inspections<br>Auto miles traveling to and from stores to pick up supplies<br>Home insurance<br>Utilities paid-electric, gas, water, garbage<br>Repair costs<br>Legal costs<br>Management fees<br>Advertising for the rental<br>Gardening and landscaping<br>Homeowner association dues |
|--|--|---|

**CHILD AND DEPENDENT CARE**

Note that dependent care also includes time while a spouse is going to school and is not employed, and is also for the care of parents or relatives.

Did you pay for child and dependent care in 2008? If YES, write, on the additional information page of the organizer, the name, address, Social Security Number or Employer Identification Number, and the amount paid for each day care provider in the space below this question.

**MOVING EXPENSES**

Did you move more than 50 miles during 2008 due to a change of jobs? If YES, provide a list of moving expenses that you were not reimbursed for by your employer (meals are not allowed as a deduction.)

**MISCELLANEOUS**

Did you add any energy efficient improvements (insulation, exterior windows and doors, metal roofs, furnaces) to your home in 2008? If YES, write, on the additional information page of the organizer, the name of the improvement and amount.

Did you add energy efficient property to your home in 2008? Energy efficient property specifically refers to solar energy, solar water heating, fuel cell, small wind energy or a geothermal heat pump. If YES, write the type of improvement and cost on the additional information page.

Did you purchase a hybrid vehicle in 2008? If YES, write, on the additional information page of the organizer, the year, name, and model of the vehicle, and the amount paid.

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US

## Miscellaneous Questions

Did anyone owe you money that became uncollectible in 2008 **and** you have already taken the person to court to collect the money, the person filed for bankruptcy, or you can no longer find that person, **and** do you have a signed note payable from that person as proof of the loan? If YES, write, on the additional information page of the organizer the person's name, the original date of the loan, and the amount of the loan.

Did you engage the services of any household employees (domestic help or a nanny) in 2008? If YES, provide the **Form W-2** that you gave them.

Did you or your spouse make any gifts to an individual that total more than \$12,000 during 2008, or any gifts to a trust? If YES, provide, on the additional information page of the organizer, the person's name, their relationship to you, and the amount that you gave to them.

**ESTIMATED TAXES**

If you have an overpayment of 2008 taxes, do you want it applied to your 2009 estimated tax (instead of being refunded)?

Do you expect your 2009 income to be **less** than your 2008 income?

<b>2008</b>	<b>1040</b>	<b>US</b>	<b>Direct Deposit &amp; Estimates (Form 1040 ES)</b>	<b>3, 6</b>
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Please enter all pertinent 2008 information.

**STIMULUS PAYMENT / DIRECT DEPOSIT OF REFUND / ELECTRONIC PAYMENT (3)**

Stimulus payment received from IRS .....		
1=direct deposit of federal tax refund into bank account .....		
1=electronic payment of balance due .....		
1=electronic payment of estimated tax .....		

**BANK INFORMATION**

Name of Bank	Percent to Deposit (xx.xx)	Routing Number	Account Number	Type of Account (Table 1)	Type of Invest. (Table 2)

**2008 ESTIMATED TAX / 1040-ES (6)**

**Federal**

	Amount Paid	Date Paid	TS	2008 Voucher Amount
Overpayment applied from 2007 .....				
1st quarter payment (due 4/15/08) .....				
2nd quarter payment (due 6/16/08) .....				
3rd quarter payment (due 9/15/08) .....				
4th quarter payment (due 1/15/09) .....				

Additional Estimated Tax Payments				

Paid with extension (not later than 4/15/09) .....				
--	--	--	--	--

**State**

	Amount Paid	Date Paid	TS	2008 Voucher Amount
Overpayment applied from 2007 .....				
1st quarter payment (due 4/15/08) .....				
2nd quarter payment (due 6/16/08) .....				
3rd quarter payment (due 9/15/08) .....				
4th quarter payment (due 1/15/09) .....				

Additional Estimated Tax Payments				

Paid with extension (not later than 4/15/09) .....				
--	--	--	--	--

**1 Type of Account**

1 = Savings  
2 = Checking

**2 Type of Investment**

1 = Checking or savings (default)      6 = Coverdell savings account (ESA)  
 2 = Taxpayer's IRA (next year limits)      7 = Other  
 3 = Spouse's IRA (next year limits)      8 = Taxpayer's IRA (current year limits)  
 4 = Health savings account (HSA)      9 = Spouse's IRA (current year limits)  
 5 = Archer MSA

	<b>Hash Total</b>	<b>3, 6</b>
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2008	1040	US	Direct Deposit & Estimates (Form 1040 ES) (cont.)	7.1
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Please enter all pertinent 2008 information.

**APPLICATION OF 2008 OVERPAYMENT (7.1)**

If you have an overpayment of 2008 taxes, do you want the excess refunded?  or applied to 2009 estimate?

Other (please explain): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2009 ESTIMATED TAX INFORMATION**

Do you expect your 2009 taxable income to be different from 2008? ..... Yes  No

If "yes" explain any differences in income, deductions, dependents, etc.: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you expect your 2009 withholding to be different from 2008? ..... Yes  No

If "yes" explain any differences: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

	Hash Total		7.1
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<b>2008</b>	<b>1040</b>	<b>US</b>	<b>Wages, Pensions, Gambling Winnings</b>	<b>10, 13.1, 13.2</b>
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Please enter all pertinent 2008 amounts & attach all W-2, W-2G and 1099-R forms.  
Last year's amounts are provided for your reference.

**WAGES, SALARIES, TIPS (10)**

No.	Name of Employer (Box c)	1=retirement plan (Box 13)		Wages, Tips, Other Compensation (Box 1)	Tax Withheld					2007 Wages
		1=spouse			Federal (Box 2)	Social Security (Box 4)	Medicare (Box 6)	State (Box 17)	Local (Box 19)	

**PENSIONS, IRA DISTRIBUTIONS (13.1)**

No.	Name of Payer	Distribution code #2		Gross Distribution (Box 1)	Taxable Amount (Box 2a)	Tax Withheld		Value of all IRAs at 12/31/08	2007 Distribution
		Distribution code #1				Federal (Box 4)	State (Box 10)		
		1=IRA/SEP/SIMPLE	1=spouse						

**GAMBLING WINNINGS (W-2G) (13.2)**

No.	Name of Payer	1=spouse	Gross Winnings (Box 1)	Tax Withheld		2007 Winnings
				Federal (Box 2)	State (Box 14)	

**GAMBLING LOSSES & WINNINGS (NON W-2G) (13.2)**

	<b>2008 Amount</b>	<b>T</b>	<b>S</b>	<b>2007 Amount</b>
Total gambling losses .....				
Winnings not reported on Form W-2G .....				

**10, 13.1, 13.2**



2008

1040

US

Miscellaneous Income

14.1

Please enter all pertinent 2008 amounts and attach all 1099-MISC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.

**MISCELLANEOUS INCOME**

	2008 Amount		2007 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Social security benefits (SSA-1099, box 5).....				
Medicare premiums paid (SSA-1099).....				
Tier 1 RR retirement benefits (RRB-1099, box 5)....				
1=lump-sum election for SS benefits.....				
Alimony received.....				
Taxable scholarships and fellowships.....				
Jury duty pay				
Household employee income not on W-2.....				
Excess minister's allowance.....				
Alaska permanent fund dividends.....				
Income from rental of personal property.....				
Income subject to S/E tax:				
_____				
_____				
_____				
_____				
_____				
Other income (1099-MISC, box 3)				
_____				
_____				
_____				
_____				
_____				

**TAX WITHHELD** (not entered elsewhere)

Federal income tax withheld.....				
State income tax withheld.....				
Local income tax withheld.....				

14.1

2008

1040

US

State & Local Tax Refunds / Unemployment Compensation

14.2

Please add, change or delete 2008 information as appropriate.  
Be sure to attach all 1099-G forms.

**STATE AND LOCAL TAX REFUNDS /  
UNEMPLOYMENT COMPENSATION (Form 1099-G)**

2008 1099-G Amount

No. <input type="text"/>	Name of payer .....		
	1=spouse .....		
	Unemployment compensation:		
	Total received (Box 1) .....		
	2008 Overpayment repaid .....		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)		
	1=city or local income tax refund .....		
	Tax year for box 2 if not 2007 (Box 3) .....		
	Federal income tax withheld (Box 4) .....		
	Taxable grants:		
	Federal taxable amount (Box 6) .....		
	State taxable amount, if different .....		
	Agriculture payments:		
Agriculture payments (Box 7) .....			
Number of farm .....			
1=box 2 is trade or business income (Box 8) .....			
State income tax withheld .....			

No. <input type="text"/>	Name of payer .....		
	1=spouse .....		
	Unemployment compensation:		
	Total received (Box 1) .....		
	2008 Overpayment repaid .....		
	State and local refunds:		
	State and local income tax refund, credit or offsets (Box 2)		
	1=city or local income tax refund .....		
	Tax year for box 2 if not 2007 (Box 3) .....		
	Federal income tax withheld (Box 4) .....		
	Taxable grants:		
	Federal taxable amount (Box 6) .....		
	State taxable amount, if different .....		
	Agriculture payments:		
Agriculture payments (Box 7) .....			
Number of farm .....			
1=box 2 is trade or business income (Box 8) .....			
State income tax withheld .....			

14.2

2008

1040

US

Education Distributions (ESA's and QTP's)

14.3

Please enter all pertinent 2008 amounts and attach all 1099-Q forms.  
 Enter qualified education expenses below that are not entered elsewhere.  
 Last year's amounts are provided for your reference.

**ESA'S AND QTP'S (Form 1099-Q)**

2008 Amount

2007 Amount

No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits).....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1).....		
	Earnings (Box 2).....		
	Basis (Box 3).....		
	Rollover: 1=nontaxable, 2=taxable (Box 4).....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ..		
	ESA's only:		
2008 contributions to this ESA.....			
Value of this account at 12/31/08 (plus outstanding rollovers)....			
Basis in this ESA as of 12/31/07.....			

No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits).....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1).....		
	Earnings (Box 2).....		
	Basis (Box 3).....		
	Rollover: 1=nontaxable, 2=taxable (Box 4).....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ..		
	ESA's only:		
2008 contributions to this ESA.....			
Value of this account at 12/31/08 (plus outstanding rollovers)....			
Basis in this ESA as of 12/31/07.....			

No. <input type="text"/>	Name of payer.....		
	1=spouse.....		
	Qualified expenses:		
	Higher education (net of nontaxable benefits).....		
	Elementary & secondary education (net of nontaxable benefits) ..		
	Form 1099-Q:		
	Gross distributions (Box 1).....		
	Earnings (Box 2).....		
	Basis (Box 3).....		
	Rollover: 1=nontaxable, 2=taxable (Box 4).....		
	Distribution type: 1=private 529, 2=state 529, 3=Coverdell ESA (Box 5) ..		
	ESA's only:		
2008 contributions to this ESA.....			
Value of this account at 12/31/08 (plus outstanding rollovers)....			
Basis in this ESA as of 12/31/07.....			

14.3

2008

1040

US

Business Income (Schedule C)

No.

16

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Principal business/profession .....	
Principal business code .....	
Business name, if different from Form 1040 .....	
Business address, if different from Form 1040 .....	
City, state, ZIP code, if different from Form 1040 .....	
Employer identification number .....	
Other accounting method .....	

Accounting method: 1=cash, 2=accrual .....		
Inventory method: 1=cost, 2=lower c/m, 3=other .....		
1=change of inventory method .....		
1=spouse, 2=joint .....		
1=first Schedule C filed for this business .....		
1=W-2 earnings as statutory employee .....		
1=not subject to self-employment tax .....		
1=did not "materially participate" .....		
1=personal services is not a material income producing factor .....		
1=investment .....		
1=minister's Schedule C .....		
1=single member limited liability company .....		

INCOME

	2008 Amount	2007 Amount
Gross receipts or sales (Form 1099-MISC, box 7) .....		
Returns and allowances .....		
Other income:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		

COST OF GOODS SOLD

Inventory at beginning of the year .....		
Purchases .....		
Cost of items for personal use .....		
Cost of labor .....		
Materials and supplies .....		
Other costs:		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
Inventory at end of the year .....		

2008

1040

US

Business Income (Schedule C) (cont.)

No.

16 p2

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

EXPENSES

	2008 Amount	2007 Amount
Accounting .....		
Advertising .....		
Answering service .....		
Bad debts from sales or service .....		
Bank charges .....		
Car and truck expenses (not entered elsewhere) .....		
Commissions .....		
Contract labor .....		
Delivery and freight .....		
Dues and subscriptions .....		
Employee benefit programs .....		
Insurance (other than health) .....		
Mortgage interest (paid to banks, etc.) .....		
Other interest (not entered elsewhere) .....		
Janitorial .....		
Laundry and cleaning .....		
Legal and professional .....		
Miscellaneous .....		
Office expense .....		
Outside services .....		
Parking and tolls .....		
Pension and profit sharing plans - contributions .....		
Pension and profit sharing plans - admin. and education costs .....		
Postage .....		
Printing .....		
Rent - vehicles, machinery, & equipment (not entered elsewhere) .....		
Rent - other .....		
Repairs .....		
Security .....		
Supplies .....		
Taxes - real estate .....		
Taxes - payroll .....		
Taxes - sales tax included in gross receipts .....		
Taxes - other (not entered elsewhere) .....		
Telephone .....		
Tools .....		
Travel .....		
Total meals and entertainment in full (50%) .....		
Department of Transportation meals in full (75%) .....		
Uniforms .....		
Utilities .....		
Wages .....		

Other expenses:

_____		
_____		
_____		
_____		
_____		

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

16 p2

<b>2008</b>	<b>1040</b>	<b>US</b>	<b>Capital Gains &amp; Losses (Schedule D)</b>	<b>17</b>
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**If you sold any stocks, bonds, or other investment property in 2008, please list the pertinent information for each sale below or provide a spreadsheet file with this information.  
Be sure to attach all 1099-B forms and brokerage statements.**

No.	Quantity (Box 5)	Description of Property (Box 7)	Date Acquired	Date Sold (Box 1a)	Sales Price (gross or net) (Box 2)	Cost or Basis	Expenses of Sale (if gross sales price entered)	Federal Income Tax Withheld (Box 4)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								

2008

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US

Installment Sales (Form 6252)

17 p2

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

PRIOR YEAR INSTALLMENT SALE

		2008 Amount	2007 Amount
No. <input type="text"/>	Description of property.....		
	Date acquired (m/d/y).....		
	Date sold (m/d/y).....		
	Gross profit ratio (.xxxx).....		
	Current year principal payments (-1 if none).....		

No. <input type="text"/>	Description of property.....		
	Date acquired (m/d/y).....		
	Date sold (m/d/y).....		
	Gross profit ratio (.xxxx).....		
	Current year principal payments (-1 if none).....		

No. <input type="text"/>	Description of property.....		
	Date acquired (m/d/y).....		
	Date sold (m/d/y).....		
	Gross profit ratio (.xxxx).....		
	Current year principal payments (-1 if none).....		

No. <input type="text"/>	Description of property.....		
	Date acquired (m/d/y).....		
	Date sold (m/d/y).....		
	Gross profit ratio (.xxxx).....		
	Current year principal payments (-1 if none).....		

No. <input type="text"/>	Description of property.....		
	Date acquired (m/d/y).....		
	Date sold (m/d/y).....		
	Gross profit ratio (.xxxx).....		
	Current year principal payments (-1 if none).....		

No. <input type="text"/>	Description of property.....		
	Date acquired (m/d/y).....		
	Date sold (m/d/y).....		
	Gross profit ratio (.xxxx).....		
	Current year principal payments (-1 if none).....		

No. <input type="text"/>	Description of property.....		
	Date acquired (m/d/y).....		
	Date sold (m/d/y).....		
	Gross profit ratio (.xxxx).....		
	Current year principal payments (-1 if none).....		

2008

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US

Sale of Home & Moving Expenses

17, 27

If you sold your home or moved in 2008, please complete the information below. For the sale of home, please provide Form 1099-S and closing statements from the purchase and sale of your home.

SALE OF HOME (17)

Description of property (Box 3)
Date acquired (m/d/y)
Date sold (m/d/y) (Box 1)
Sales price (Box 2)
1=sale of home
1=owned and used property as main home for at least 2 of 5 years before sale
1=business use in year of sale.

Adjusted Basis

Original cost
Improvements:
Adjusted basis

Expenses of Sale (Commissions, advertising fees, legal fees, and loan charges paid by the seller)

Total expenses of sale.

Reduced Exclusion

Please complete the following information if due to a change in health, place of employment, or unforeseen circumstances you either: a) Did not meet the ownership and use tests \*, or b) Excluded gain on the sale of another home after May 6, 1997.

If excl. gain from another home after May 6, 1997 & within 2 yrs. of current sale, enter date of sale (m/d/y)
1=sale due to change in health, employment or unforeseen circumstances
Days used as main home - taxpayer.
Days used as main home - spouse.
Days property owned - taxpayer.
Days property owned - spouse.

MOVING EXPENSES (27) (If you moved because of a change in the location of your job)

1=spouse, 2=joint
1=armed forces move due to permanent change of station.
Miles from old home to new work place.
Miles from old home to old work place.
Expenses for transportation and storage of household goods and personal effects.
Lodging and travel (excluding meals):
Lodging and travel (excluding automobile)
Parking fees and tolls
Gas and oil
Miles driven to new home (1/1/08 - 6/30/08)
Miles driven to new home (7/1/08 - 12/31/08)

(\* owned and used property as main home for at least 2 of 5 years before sale)

17, 27

2008

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US

Rental & Royalty Income (Schedule E)

No.

18

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

GENERAL INFORMATION

Kind of property .....	<input type="text"/>
Location of property .....	<input type="text"/>

Percentage of ownership if not 100% (.xxxx) .....	<input type="text"/>	
Percentage of tenant occupancy if not 100% (.xxxx) .....	<input type="text"/>	
1=spouse, 2=joint .....	<input type="text"/>	
1=nonpassive activity, 2=passive royalty .....	<input type="text"/>	
1=did not actively participate .....	<input type="text"/>	
1=real estate professional .....	<input type="text"/>	
1=rental other than real estate .....	<input type="text"/>	
1=investment .....	<input type="text"/>	
1=single member limited liability company .....	<input type="text"/>	

INCOME

	2008 Amount	2007 Amount
Rents received (Form 1099-MISC, box 1) .....	<input type="text"/>	<input type="text"/>
Royalties received (Form 1099-MISC, box 2) .....	<input type="text"/>	<input type="text"/>

DIRECT EXPENSES

NOTE: Direct expenses are related only to the rental activity. These include rental agency fees, advertising, and office supplies.

Advertising .....	<input type="text"/>	<input type="text"/>
Association dues .....	<input type="text"/>	<input type="text"/>
Auto and travel (not entered elsewhere) .....	<input type="text"/>	<input type="text"/>
Cleaning and maintenance .....	<input type="text"/>	<input type="text"/>
Commissions .....	<input type="text"/>	<input type="text"/>
Gardening .....	<input type="text"/>	<input type="text"/>
Insurance .....	<input type="text"/>	<input type="text"/>
Legal and professional fees .....	<input type="text"/>	<input type="text"/>
Licenses and permits .....	<input type="text"/>	<input type="text"/>
Management fees .....	<input type="text"/>	<input type="text"/>
Miscellaneous .....	<input type="text"/>	<input type="text"/>
Mortgage interest (paid to banks, etc.) .....	<input type="text"/>	<input type="text"/>
Qualified mortgage insurance premiums .....	<input type="text"/>	<input type="text"/>
Excess mortgage interest .....	<input type="text"/>	<input type="text"/>
Other interest (not entered elsewhere) .....	<input type="text"/>	<input type="text"/>
Painting and decorating .....	<input type="text"/>	<input type="text"/>
Pest control .....	<input type="text"/>	<input type="text"/>
Plumbing and electrical .....	<input type="text"/>	<input type="text"/>
Repairs .....	<input type="text"/>	<input type="text"/>
Supplies .....	<input type="text"/>	<input type="text"/>
Taxes - real estate .....	<input type="text"/>	<input type="text"/>
Taxes - other (not entered elsewhere) .....	<input type="text"/>	<input type="text"/>
Telephone .....	<input type="text"/>	<input type="text"/>
Utilities .....	<input type="text"/>	<input type="text"/>
Wages and salaries .....	<input type="text"/>	<input type="text"/>
Other:	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

NOTE: If you purchased or disposed of any business assets, please complete Sheet 22.

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2008

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US

Rental & Royalty Income (Sch. E) (cont.)

No.

18 p2

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference. The indirect expense column should only be used for vacation homes or less than 100% tenant occupied rentals.

**OIL AND GAS**

	2008 Amount	2007 Amount
Production type (preparer use only) .....		
Cost depletion .....		
Percentage depletion rate or amount .....		
State cost depletion, if different (-1 if none) .....		
State % depletion rate or amount, if different (-1 if none) .....		

**VACATION HOME**

Number of days rented at fair market value .....		
Number of days personal use .....		
Number of days owned (if optional method elected) .....		

**INDIRECT EXPENSES**

NOTE: Indirect expenses are related to operating or maintaining the dwelling unit. These include repairs, insurance, and utilities.

Advertising .....		
Association dues .....		
Auto and travel (not entered elsewhere) .....		
Cleaning and maintenance .....		
Commissions .....		
Gardening .....		
Insurance .....		
Legal and professional fees .....		
Licenses and permits .....		
Management fees .....		
Miscellaneous .....		
Mortgage interest (paid to banks, etc.) .....		
Qualified mortgage insurance premiums .....		
Excess mortgage interest .....		
Other interest (not entered elsewhere) .....		
Painting and decorating .....		
Pest control .....		
Plumbing and electrical .....		
Repairs .....		
Supplies .....		
Taxes - real estate .....		
Taxes - other (not entered elsewhere) .....		
Telephone .....		
Utilities .....		
Wages and salaries .....		

Other:

_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		
_____		

<b>2008</b>	<b>1040</b>	<b>US</b>	<b>Asset Acquisition List</b>	<b>22</b> p2
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**If you purchased any business assets (furniture, equipment, vehicles, real estate, etc.) or converted any personal assets to business use in 2008, please enter all pertinent information below.**

No.	Description of Property	Related Business or Activity	Preparer Use Only			Date Placed in Service	Cost or Basis	Preparer Use Only	
			Form	No. of Form	Category			Current Section 179	Method
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									

2008

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US

Vehicle Expenses

No.

22 p3

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

**GENERAL INFORMATION**

	2008 Amount	2007 Amount
Description of vehicle .....		
1=no evidence to support your deduction. ....		
1=no written evidence to support your deduction. ....		
1=vehicle is available for off-duty personal use .....		
1=no other vehicle is available for personal use. ....		
1=vehicle used primarily by more than 5% owner .....		
Number of months your job required a vehicle (if not 12 months) .....		

**AUTOMOBILE MILEAGE**

Total mileage .....		
Business mileage (1/1/08 - 6/30/08) .....		
Business mileage (7/1/08 - 12/31/08) .....		
Commuting mileage .....		
Average daily round-trip commute .....		

**ACTUAL EXPENSES**

Parking fees and tolls (business portion only) .....		
Gasoline, lube, oil .....		
Repairs .....		
Tires .....		
Insurance .....		
Miscellaneous .....		
Auto license (other than personal property taxes) .....		
Personal property taxes (based on car's value) .....		
Interest (car loan) (for Schedule C, E & F) .....		
Vehicle rent or lease payments .....		
Inclusion amount (enter as positive) .....		
Value of employer-provided vehicle on Form W-2 (2106) .....		

**2008**

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**US**

**Adjustments to Income**

**24**

Please enter all pertinent 2008 information. Last year's amounts are provided for your reference.

**TRADITIONAL IRA CONTRIBUTIONS**

	2008 Amount		2007 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
IRA contributions you made or expect to make (1=maximum) (\$5,000/\$6,000 if 50 or older) . . . . .				
Contributions made to date . . . . .				
1=covered by plan, 2=not covered . . . . .				
2008 payments from 1/1/09 to 4/15/09 . . . . .				

**ROTH IRA CONTRIBUTIONS**

	2008 Amount	2007 Amount
	Taxpayer	Spouse
Roth IRA contributions you made or expect to make (1=maximum) (\$5,000/\$6,000 if 50 or older) . . . . .		
Contributions made to date . . . . .		

**SEP, SIMPLE AND QUALIFIED PLANS (KEOGH)**

	2008 Amount		2007 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Profit-sharing (25%/1.25) contributions you made or expect to make (1=maximum) . . . . .				
Money purchase (25%/1.25) contributions you made or expect to make (1=maximum) . . . . .				
Defined benefit contributions you expect to make . . . . .				
Self-employed SEP (25%/1.25) contributions you made or expect to make (1=maximum) . . . . .				
Plan contribution rate if not .25 (.xxxx) . . . . .				
Individual 401k: SE elective deferrals (except Roth) (1=max.) . . . . .				
Individual 401k: SE designated Roth contributions (1=max.) . . . . .				
SIMPLE contributions:				
Self-employed SIMPLE contributions you made or expect to make (1=maximum) . . . . .				
Employer matching rate if not .03 (.xxxx) . . . . .				
1=nonelective contributions (2%) . . . . .				
Contributions made to date . . . . .				

**ADJUSTMENTS TO INCOME**

	2008 Amount	2007 Amount
	Taxpayer	Spouse
Self-employed health insurance:		
Total premiums (excluding long-term care) . . . . .		
Long-term care premiums . . . . .		
Student loan interest paid (1098-E, box 1) . . . . .		
Educator expenses (kindergarten thru grade 12) . . . . .		
Jury duty pay given to employer . . . . .		
Expenses from rental of personal property . . . . .		
Other adjustments to income:		
_____		
_____		
_____		

Alimony paid:	2008 Amount		2007 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Recipient's first name . . . . .				
Recipient's last name . . . . .				
Recipient's SSN . . . . .				
Amount paid . . . . .				
		<b>2007 amt:</b>		<b>2007 amt:</b>

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US

Itemized Deductions

25

Please enter all pertinent 2008 amounts and attach all 1098 forms. Last year's amounts are provided for your reference.

MEDICAL AND DENTAL EXPENSES

NOTE: Enter self-employed health insurance premiums on Sheet 24 and Medicare insurance premiums on Sheet 14.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Rows include Prescription medicines and drugs, Doctors, dentists and nurses, Hospitals and nursing homes, Insurance premiums not entered elsewhere, Long-term care premiums, Lodging and transportation, Medical miles driven, and Other medical and dental expenses.

TAXES PAID (State and local withholding and 2008 estimates are automatic.)

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Rows include State income taxes (1/08 payment, 2007 extension, 2007 return, prior years), and City/local income taxes (1/08 payment, 2007 extension, 2007 return).

SALES AND USE TAXES PAID

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Rows include State and local sales taxes, Use taxes paid on 2008 purchases, Use taxes paid with 2007 state return, and Taxes paid on vehicles, boats, and aircraft.

OTHER TAXES PAID

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Rows include Real estate taxes (principal residence, property held for investment), Personal property taxes, Foreign income taxes, and Other taxes.

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US

Itemized Deductions (continued)

25 p2

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

INTEREST PAID

Home mortgage interest (Box 1) and points (Box 2) reported on Form 1098:

2008 Amount

TS

2007 Amount

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes lines for home mortgage interest reported on Form 1098.

Home mortgage interest not reported on Form 1098:

Form for home mortgage interest not reported on Form 1098, including fields for payee's name, SSN, address, and amount paid.

Points not reported on Form 1098:

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes lines for points not reported on Form 1098.

Mortgage insurance premiums on post 12/31/06 contracts (Box 4) . . . . .

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes line for mortgage insurance premiums.

Investment interest (interest on margin accounts):

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes line for investment interest.

Passive interest . . . . .

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes line for passive interest.

Certain home mortgage interest included above (6251) . . . . .

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes line for certain home mortgage interest.

NOTE: Points paid on loans other than to buy, build, or improve your main home are deductible over the life of the mortgage. For these types of loans also provide the dates and lives of the loans.

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).

Churches, schools, hospitals, and other charitable organizations (50% limitation):

Contributions by cash or check:

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes lines for cash or check contributions to churches, schools, hospitals, etc.

Contributions above made for Midwestern disaster relief . . . . .

Volunteer expenses (out-of-pocket) . . . . .

Number of charitable miles . . . . .

Midwestern disaster relief miles (5/2/08 - 6/30/08) . . . . .

Midwestern disaster relief miles (7/1/08 - 12/31/08) . . . . .

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes lines for disaster relief and volunteer expenses.

Veterans' organizations, fraternal societies, nonprofit cemeteries, and certain private nonoperating foundations (30% limitation):

Contributions by cash or check:

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes lines for cash or check contributions to veterans' organizations, etc.

Volunteer expenses (out-of-pocket) . . . . .

Number of charitable miles . . . . .

Midwestern disaster relief miles (5/2/08 - 6/30/08) . . . . .

Midwestern disaster relief miles (7/1/08 - 12/31/08) . . . . .

Table with 3 columns: 2008 Amount, TS, 2007 Amount. Includes lines for disaster relief and volunteer expenses.

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2008

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US

Itemized Deductions (continued)

25 p3

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

NONCASH CONTRIBUTIONS

NOTE: Use Sheet 26 if total noncash contributions are over \$500. 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.

50% limitation (see above):

2008 Amount

TS

2007 Amount

Three horizontal lines for entering 50% limitation amounts.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 3 rows.

30% limitation (see above):

Three horizontal lines for entering 30% limitation amounts.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 3 rows.

30% capital gain property (gifts of capital gain property to 50% limit orgs.):

Three horizontal lines for entering 30% capital gain property amounts.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 3 rows.

20% capital gain property (gifts of capital gain property to non-50% limit orgs.):

Three horizontal lines for entering 20% capital gain property amounts.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 3 rows.

MISCELLANEOUS DEDUCTIONS (subject to 2% AGI limit)

Union and professional dues.....

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 1 row.

Other unreimbursed employee expenses (uniforms and protective clothing, professional subscriptions, employment agency fees, and certain edu. expenses):

Five horizontal lines for entering other unreimbursed employee expenses.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 5 rows.

Investment expense:

Five horizontal lines for entering investment expense amounts.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 5 rows.

Tax return preparation fee.....

Safe deposit box rental.....

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 2 rows.

Miscellaneous deductions (2% AGI) (certain legal and accounting fees, and custodial fees):

Five horizontal lines for entering miscellaneous deductions.

Table with 3 columns: 2008 Amount, TS, 2007 Amount. 5 rows.

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US

Noncash Contributions (Form 8283)

26

If your total noncash contributions are in excess of \$500 in 2008, please complete the information below for each donee using the following guidelines:

- \* If you contributed a motor vehicle, boat, or airplane with a claimed value of more than \$500, attach Form 1099-C or other written acknowledgement received from the donee organization.
- \* A deduction for contributions of clothing or other household items that are not in *good* used condition or better is not allowed. In addition, a deduction for any item with minimal monetary value may be denied. However, these rules do not apply to any contribution of a single item for which a deduction of more than \$500 is claimed, if a qualified appraisal for the donated property is provided.

**DONATED PROPERTY INFORMATION**

No. <input style="width: 40px;" type="text"/>	Name of charitable organization (donee) .....		
	Street address .....		
	City, state, ZIP code .....		
	1=spouse, 2=joint .....		
	Property description .....		
	Date of contribution (m/d/y) * .....		
	Date acquired by donor (m/y) * .....		
	How acquired by donor (Table 1 or describe) .....		
	Donor's cost or basis .....		
	Fair market value .....		
Method used to determine FMV (Table 2 or describe) .....			

No. <input style="width: 40px;" type="text"/>	Name of charitable organization (donee) .....		
	Street address .....		
	City, state, ZIP code .....		
	1=spouse, 2=joint .....		
	Property description .....		
	Date of contribution (m/d/y) * .....		
	Date acquired by donor (m/y) * .....		
	How acquired by donor (Table 1 or describe) .....		
	Donor's cost or basis .....		
	Fair market value .....		
Method used to determine FMV (Table 2 or describe) .....			

No. <input style="width: 40px;" type="text"/>	Name of charitable organization (donee) .....		
	Street address .....		
	City, state, ZIP code .....		
	1=spouse, 2=joint .....		
	Property description .....		
	Date of contribution (m/d/y) * .....		
	Date acquired by donor (m/y) * .....		
	How acquired by donor (Table 1 or describe) .....		
	Donor's cost or basis .....		
	Fair market value .....		
Method used to determine FMV (Table 2 or describe) .....			

**1 How Property was Acquired**

- 1 = Purchase
- 2 = Gift
- 3 = Inheritance
- 4 = Exchange

**2 Method Used to Determine FMV**

- 1 = Appraisal
- 2 = Thrift shop value
- 3 = Catalog
- 4 = Comparable sales

For other methods, see IRS Pub. 561.

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2008

1040

US

Business Use of Home (Form 8829)

No.

29

Please enter 2008 indirect expenses in full. Nonbusiness portion will carry to Schedule A. Business percentage will be applied to indirect expenses only.

**BUSINESS USE OF HOME**

	2008 Amount	2007 Amount
Form.....		
Number of form (e.g., enter 2 for Schedule C number 2).....		
Business use area (square footage).....		
Total area of home (square footage).....		
Total hours facility used (for daycare facilities only).....		
Total hours available (if not 8,760).....		
% (.xx) or amount of gross income from home if not 100% (-1 if none).....		
% (.xx) or amount of expenses from home if not 100% (-1 if none).....		

**INDIRECT EXPENSES**

NOTE: Indirect expenses are for keeping up and running your entire home. They benefit both the business and personal parts of your home.

Mortgage interest.....		
Real estate taxes.....		
Qualified mortgage insurance premiums.....		
Casualty losses.....		
Insurance.....		
Miscellaneous.....		
Rent.....		
Repairs and maintenance.....		
Utilities.....		
Excess mortgage interest.....		
Other indirect expenses:		
_____		
_____		
_____		

**DIRECT EXPENSES**

NOTE: Direct expenses benefit only the business part of your home. They include painting or repairs made to specific areas or rooms used for business.

Mortgage interest.....		
Real estate taxes.....		
Qualified mortgage insurance premiums.....		
Casualty losses.....		
Insurance.....		
Miscellaneous.....		
Rent.....		
Repairs and maintenance.....		
Utilities.....		
Excess mortgage interest.....		
Excess casualty losses.....		
Allowable casualty losses.....		
Other direct expenses:		
_____		
_____		
_____		

2008

1040

US

Employee/Vehicle Bus. Exp. (Form 2106)

No.

30

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

**GENERAL INFORMATION**

Occupation, if different from Form 1040.....

Form.....	<input type="text"/>	
Number of form (1=first Schedule C, 2=second, etc.).....	<input type="text"/>	
1=spouse.....	<input type="text"/>	
1=performance artist, 2=handicapped, 3=fee-basis government official.....	<input type="text"/>	

**EMPLOYEE BUSINESS EXPENSES**

	2008 Amount	2007 Amount
Meal and entertainment expenses.....	<input type="text"/>	<input type="text"/>
Reimbursements for meals and entertainment not on W-2, box 1.....	<input type="text"/>	<input type="text"/>
1=Department of Transportation (75% meal allowance).....	<input type="text"/>	
Local transportation (bus, taxi, train, etc.).....	<input type="text"/>	<input type="text"/>
Travel expenses while away from home overnight.....	<input type="text"/>	<input type="text"/>
Reimbursements not included on Form W-2, box 1.....	<input type="text"/>	<input type="text"/>
Other business expenses:	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>

30

2008

1040

US

Vehicle Expenses (Form 2106) (cont.)

No.

30 p2

Please enter all pertinent 2008 amounts. Last year's amounts are provided for your reference.

VEHICLE INFORMATION

	2008 Amount	2007 Amount
1=vehicle used primarily by more than 5% owner .....		
1=vehicle is available for off-duty personal use .....		
1=no other vehicle is available for personal use.....		
1=no evidence to support your deduction.....		
1=no written evidence to support your deduction.....		

VEHICLE 1

Description of vehicle .....		
Date placed in service (m/d/y) .....		
Total mileage .....		
Business mileage (1/1/08 - 6/30/08) .....		
Business mileage (7/1/08 - 12/31/08) .....		
Commuting mileage.....		
Average daily round-trip commute.....		
Number of months of vehicle business use (if not 12).....		
Parking fees and tolls (business portion only).....		
Actual expenses:		
Gasoline, lube, oil .....		
Repairs.....		
Tires .....		
Insurance.....		
Miscellaneous .....		
Auto license (other than personal property taxes).....		
Personal property taxes (based on car's value).....		
Interest (car loan) (for Schedule C, E & F).....		
Vehicle rent or lease payments.....		
Inclusion amount (enter as positive).....		
Value of employer-provided vehicle on Form W-2 (2106).....		

VEHICLE 2

Description of vehicle .....		
Date placed in service (m/d/y) .....		
Total mileage .....		
Business mileage (1/1/08 - 6/30/08) .....		
Business mileage (7/1/08 - 12/31/08) .....		
Commuting mileage.....		
Average daily round-trip commute.....		
Number of months of vehicle business use (if not 12).....		
Parking fees and tolls (business portion only).....		
Actual expenses:		
Gasoline, lube, oil .....		
Repairs.....		
Tires .....		
Insurance.....		
Miscellaneous .....		
Auto license (other than personal property taxes).....		
Personal property taxes (based on car's value).....		
Interest (car loan) (for Schedule C, E and F).....		
Vehicle rent or lease payments.....		
Inclusion amount (enter as positive).....		
Value of employer-provided vehicle on Form W-2 (2106).....		

30 p2

2008

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US

Foreign Income Exclusion (Form 2555)

No.

31.1

Please enter all pertinent 2008 information.

GENERAL INFORMATION

1=spouse.

Foreign address of taxpayer, if different from Form 1040:
Street address.
City
Region
Postal code
Country.

Employer:
Name
U.S. street address
U.S. city
U.S. state
U.S. ZIP code
Foreign street address
Foreign city
Foreign region
Foreign postal code
Foreign country
Employer type: 1=foreign entity, 2=U.S. company, 3=self, 4=foreign affiliate of U.S. company, 5=other.
Employer type, if other.

Type of exclusion revoked if revoked in earlier year (if applicable):
Tax year revocation was effective

Country of citizenship.

City and country of separate foreign residence if maintained due to adverse living conditions (if applicable):
Number of days during tax year at separate foreign address (if applicable)

Tax homes(s) during tax year:
Dates tax home(s) were established (m/d/y)

31.1

2008

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US

Foreign Income Exclusion (2555)

No.

31.1 p2

Please enter all pertinent 2008 information.

**TRAVEL INFORMATION**

NOTE: Please enter all travel for 2008 as well as travel for 2009 known to date.

Travel Type (table)	Name of country (if not United States)	Date arrived	Date left	Days in U.S. on business

**BONA FIDE RESIDENCE TEST AND PHYSICAL PRESENCE TEST**

Beginning date for bona fide residence (m/d/y) .....	<input type="text"/>	
Ending date for bona fide residence (m/d/y) .....	<input type="text"/>	
Living quarters in foreign country: 1=purchased home, 2=rented house or apartment, 3=rented room, 4=quarters furnished by employer.....	<input type="text"/>	
Names of family living abroad with taxpayer (if applicable):	<input type="text"/>	

Names of family living abroad with taxpayer (if applicable):	Period family lived abroad

1=submitted statement to country of bona fide residence. ....	<input type="text"/>	
1=required to pay income tax to country of bona fide residence. ....	<input type="text"/>	
Contractual terms relating to length of employment abroad. ....	<input type="text"/>	
Type of visa you entered foreign country under .....	<input type="text"/>	
Explanation why visa limited stay or employment in country (if applicable) .....	<input type="text"/>	

Address of home in U.S. maintained while living abroad (if applicable):	1=U.S. home rented (if applicable)	Names of occupants in U.S. home (if applicable)	Relationship of occupants in U.S. home (if applicable)

Principal country of employment .....

**FOREIGN HOUSING EXPENSES**

	2008 Amount	2007 Amount
Qualified housing expenses. ....	<input type="text"/>	<input type="text"/>
Location of housing expenses:	Qualifying days in location (multiple locations only)	

**Travel Type**

1 = Travel to U.S. (default)  
 2 = Travel to foreign country  
 3 = Travel to restricted country

2008

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US

Foreign Income Exclusion (Form 2555)

No.

31.2

Please enter all pertinent 2008 amounts and attach all W-2 forms, or other wage statements. Enter amounts in U.S. dollars only. Last year's amounts are provided for your reference.

**FOREIGN WAGES, SALARIES, TIPS**

	2008 Amount	2007 Amount
Name or number .....		
1=spouse .....		
1=retirement plan (Box 13) .....		
Name of employer (Box c) .....		
Wages, tips, other compensation (Box 1) .....		
Federal income tax withheld (Box 2) .....		
Social security tax withheld (Box 4) .....		
Medicare tax withheld (Box 6) .....		
State income tax withheld (Box 17) .....		
Local income tax withheld (Box 19) .....		

**FOREIGN ALLOWANCES, REIMBURSEMENTS AND OTHER EARNED INCOME**

**Noncash Income**

Home (lodging) .....		
Meals .....		
Car .....		
Other properties or facilities:		

**Allowances and Reimbursements**

Cost of living and overseas differential .....		
Family .....		
Education .....		
Home leave .....		
Quarters .....		
Other purposes:		

Meals and lodging provided for the convenience of the Employer (excludable under section 119) .....		
---	--	--

**Other Foreign Earned Income**


**2008 Days Worked Allocation Information**

Total number of days worked (if not 240) .....		
Total days worked before and after foreign assignment .....		
Foreign days worked before and after foreign assignment .....		

31.2

2008

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US

Health Savings Accounts (8889)

32.1

Please enter all pertinent 2008 amounts & attach all 1099-SA forms.  
Last year's amounts are provided for your reference.

**HSA CONTRIBUTIONS**

NOTE: Contributions to an HSA are only eligible to persons covered under a high deductible health plan. For tax year 2008, a high deductible health plan is one with an annual deductible that is not less than \$1,100 for self-only coverage or \$2,200 for family coverage, and the annual out-of-pocket expenses (deductibles, co-payments, and other amounts, but not premiums) do not exceed \$5,600 for self-only coverage or \$11,200 for family coverage.

	2008 Amount		2007 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
1= self-only coverage, 2= family coverage. ....				
HSA contributions you made or expect to make, except rollovers, employer contributions, and contributions made to an employee account through a cafeteria plan (1=maximum) .....				
Contributions included above that were made after you became eligible for Medicare .....				
Contributions made to date. ....				

**HSA DISTRIBUTIONS**

Total HSA distribution received (1099-SA, box 1) ...				
Distributions included above that were rolled over to another HSA .....				
Total unreimbursed qualified medical expenses. ....				

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Child and Dependent Care Expenses (Form 2441)

33.1,33.2

Please enter all pertinent 2008 information. Last year's amounts are provided for your reference. You must have paid for the care of one or more dependents enabling you to work or attend school to qualify for this credit.

**DEPENDENT CARE EXPENSES (33.1)**

	2008 Amount		2007 Amount	
	Taxpayer	Spouse	Taxpayer	Spouse
Dependent care expenses incurred but not paid in 2008 . . .				
Employer-provided benefits forfeited in 2008 . . . . .				

**PERSONS AND EXPENSES QUALIFYING FOR DEPENDENT CARE CREDIT**

No. <input type="text"/>	First name . . . . .	
	Last name . . . . .	
	Date of birth (m/d/y) . . . . .	
	Social security number . . . . .	
	Qualified dependent care expenses incurred and paid in 2008 . . . . .	2007 amt:
	1=disabled . . . . . 1=spouse, 2=joint . . . . .	

No. <input type="text"/>	First name . . . . .	
	Last name . . . . .	
	Date of birth (m/d/y) . . . . .	
	Social security number . . . . .	
	Qualified dependent care expenses incurred and paid in 2008 . . . . .	2007 amt:
	1=disabled . . . . . 1=spouse, 2=joint . . . . .	

No. <input type="text"/>	First name . . . . .	
	Last name . . . . .	
	Date of birth (m/d/y) . . . . .	
	Social security number . . . . .	
	Qualified dependent care expenses incurred and paid in 2008 . . . . .	2007 amt:
	1=disabled . . . . . 1=spouse, 2=joint . . . . .	

**PERSONS OR ORGANIZATIONS PROVIDING CARE (33.2)**

No. <input type="text"/>	Name of provider . . . . .	
	Street address . . . . .	
	City, state, ZIP code . . . . .	
	Identification number (SSN or EIN) . . . . .	
	Amount paid to care provider in 2008 . . . . .	2007 amt:
	1=spouse, 2=joint . . . . .	

No. <input type="text"/>	Name of provider . . . . .	
	Street address . . . . .	
	City, state, ZIP code . . . . .	
	Identification number (SSN or EIN) . . . . .	
	Amount paid to care provider in 2008 . . . . .	2007 amt:
	1=spouse, 2=joint . . . . .	

33.1,33.2

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Qualified Adoption Expenses (Form 8839)

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Please enter all pertinent 2008 information. Last year's amounts are provided for your reference.

**ELIGIBLE CHILDREN**

2008 Amount

2007 Amount

No. <input type="text"/>	First name.....			
	Last name.....			
	Identification number.....			
	Date of birth (m/d/y).....			
	1=born before 1991 and was disabled.....			
	1=special needs child.....			
	1=foreign child.....			
	1=adoption was not final in 2008.....			
	Qualified Adoption Expenses Paid in	2007 for adoption not finalized by end of 2008.....		
		1997-2001 for adoption of foreign child finalized in 2008.....		
2007 and 2008 for adoption finalized in 2008.....				
2008 for adoption finalized before 2008.....				
1=spouse, 2=joint.....				

No. <input type="text"/>	First name.....			
	Last name.....			
	Identification number.....			
	Date of birth (m/d/y).....			
	1=born before 1991 and was disabled.....			
	1=special needs child.....			
	1=foreign child.....			
	1=adoption was not final in 2008.....			
	Qualified Adoption Expenses Paid in	2007 for adoption not finalized by end of 2008.....		
		1997-2001 for adoption of foreign child finalized in 2008.....		
2007 and 2008 for adoption finalized in 2008.....				
2008 for adoption finalized before 2008.....				
1=spouse, 2=joint.....				

No. <input type="text"/>	First name.....			
	Last name.....			
	Identification number.....			
	Date of birth (m/d/y).....			
	1=born before 1991 and was disabled.....			
	1=special needs child.....			
	1=foreign child.....			
	1=adoption was not final in 2008.....			
	Qualified Adoption Expenses Paid in	2007 for adoption not finalized by end of 2008.....		
		1997-2001 for adoption of foreign child finalized in 2008.....		
2007 and 2008 for adoption finalized in 2008.....				
2008 for adoption finalized before 2008.....				
1=spouse, 2=joint.....				

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Education Credits / Tuition Deduction

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Please complete the information below if you paid qualified education expenses in 2008 for you, your spouse, or your dependents enrolled in an accredited postsecondary institution. Last year's amounts are provided for your reference.

**PERSONS AND EXPENSES QUALIFYING FOR EDUCATION CREDITS OR TUITION DED.**

		2008 Amount	2007 Amount
No. <input type="text"/>	Student Info.	1=taxpayer, 2=spouse.....	
		First name .....	
		Last name .....	
		Social security number .....	
	1=hope credit, 2=lifetime learning credit .....		
Qualified tuition and fees paid in 2008 (net of refund or assistance and not entered elsewhere) .....			
Amount of prior year refund or assistance* .....			
No. <input type="text"/>	Student Info.	1=taxpayer, 2=spouse.....	
		First name .....	
		Last name .....	
		Social security number .....	
	1=hope credit, 2=lifetime learning credit .....		
Qualified tuition and fees paid in 2008 (net of refund or assistance and not entered elsewhere) .....			
Amount of prior year refund or assistance* .....			
No. <input type="text"/>	Student Info.	1=taxpayer, 2=spouse.....	
		First name .....	
		Last name .....	
		Social security number .....	
	1=hope credit, 2=lifetime learning credit .....		
Qualified tuition and fees paid in 2008 (net of refund or assistance and not entered elsewhere) .....			
Amount of prior year refund or assistance* .....			
No. <input type="text"/>	Student Info.	1=taxpayer, 2=spouse.....	
		First name .....	
		Last name .....	
		Social security number .....	
	1=hope credit, 2=lifetime learning credit .....		
Qualified tuition and fees paid in 2008 (net of refund or assistance and not entered elsewhere) .....			
Amount of prior year refund or assistance* .....			
No. <input type="text"/>	Student Info.	1=taxpayer, 2=spouse.....	
		First name .....	
		Last name .....	
		Social security number .....	
	1=hope credit, 2=lifetime learning credit .....		
Qualified tuition and fees paid in 2008 (net of refund or assistance and not entered elsewhere) .....			
Amount of prior year refund or assistance* .....			

\*Refund of qualified expenses and tax-free educational assistance received after you file your return for the year in which the expenses were paid.

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**Household Employment Taxes (Schedule H)**

**42**

Please enter all pertinent 2008 information. Last year's amounts are provided for your reference.

**HOUSEHOLD EMPLOYMENT TAXES**

If you paid any one household employee cash wages of \$1,600 or more in 2008; withheld federal income tax during 2008 for any household employee; or paid total cash wages of \$1,000 or more in any calendar quarter of 2007 or 2008 to household employees, please complete the following:

Employer identification number .....	
1=spouse, 2=joint .....	

Social security, Medicare and income taxes:	2008 Amount	2007 Amount
1=paid any one employee cash wages of \$1,500 or more .....		
1=withheld federal income tax for household employee .....		
Total cash wages subject to social security taxes .....		
Total cash wages subject to Medicare taxes .....		
Federal income tax withheld .....		
Advance earned income credit payments .....		
Taxes withheld from state disability payments .....		

Federal unemployment tax:	2008 Amount	2007 Amount
1=paid total cash wages of \$1,000 or more in any calendar quarter of 2007 or 2008 .....		
Total cash wages subject to FUTA tax .....		
1=paid unemployment contributions to only one state .....		
1=paid all state unemployment contributions by 4/15/09 .....		
1=all wages taxable for FUTA were also taxable for state unemployment .....		
Name of state .....		
State reporting number .....		
Contributions paid to state unemployment fund .....		

