

| | | | | |
|-------------|-------------|-----------|---------------------------|----------|
| 2007 | 1040 | US | Client Information | 1 |
|-------------|-------------|-----------|---------------------------|----------|

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 Telephone number: (954) 475-1260
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 E-mail address:

Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2007 tax return. Please add, change, or delete information as appropriate.

CLIENT INFORMATION

| | | | |
|------------------|---|--|--|
| Filing Status | Filing status (table) | | <p align="center">Filing Status</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) (2005 or 2006). | | |
| 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. | | |

Please add, change or delete information for 2007.

CLIENT INFORMATION

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

Daytime Phone

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

| | | | | |
|-------------|-------------|-----------|-------------------|----------|
| 2007 | 1040 | US | Dependents | 2 |
|-------------|-------------|-----------|-------------------|----------|

Please add, change or delete information for 2007.

DEPENDENTS

| | Dependent | Dependent | |
|--|-----------|-----------|--|
| First name | | | <p>Type of Dependent</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>Earned Income Credit</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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Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2007, please check the appropriate box and provide additional information if necessary.

| YES | NO | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | PERSONAL INFORMATION |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Could you be claimed as a dependent on another person's tax return for 2007? |
| | | DEPENDENTS |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2007? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any children under age 18 on January 1, 2008 with interest and dividend income in excess of \$850, or total investment income in excess of \$1,700? |
| | | INCOME |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes? |
| | | PURCHASES, SALES AND DEBT |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds or other investment property in 2007? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you add any energy efficient improvements (insulation systems, exterior windows and doors, metal roofs) to your home in 2007? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new hybrid vehicle in 2007? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts cancelled or forgiven? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did anyone owe you money which had become uncollectible? |

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Miscellaneous Questions (continued)

If any of the following items pertain to you or your spouse for 2007, please check the appropriate box and provide additional information if necessary.

| YES | NO | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | RETIREMENT PLANS |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA? |
| <input type="checkbox"/> | <input type="checkbox"/> | EDUCATION |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |
| <input type="checkbox"/> | <input type="checkbox"/> | ITEMIZED DEDUCTIONS |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss because of damaged or stolen property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you work out of town for part of the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your car on the job (other than to and from work)? |
| <input type="checkbox"/> | <input type="checkbox"/> | ESTIMATED TAXES |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you apply an overpayment of 2006 taxes to your 2007 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of 2007 taxes, do you want the excess applied to your 2008 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you expect your 2008 taxable income and withholdings to be different from 2007? |
| <input type="checkbox"/> | <input type="checkbox"/> | MISCELLANEOUS |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to electronically file your tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? |

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Miscellaneous Questions (continued)

If any of the following items pertain to you or your spouse for 2007, please check the appropriate box and provide additional information if necessary.

- | YES | NO | MISCELLANEOUS (continued) |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive a HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur moving expenses due to a change of employment? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any household employees? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$12,000, or any gifts to a trust? |

Please enter all pertinent 2007 information.

DIRECT DEPOSIT OF REFUND / ELECTRONIC PAYMENT (3)

| | | |
|--|--|--|
| 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) |
|--------------|----------------------------|----------------|----------------|---------------------------|---------------------------|
| | | | | | |
| | | | | | |
| | | | | | |

2007 ESTIMATED TAX / 1040-ES (6)

Federal

| | Amount Paid | Date Paid | TS | 2007 Voucher Amount |
|---|-------------|-----------|----|---------------------|
| Overpayment applied from 2006 | | | | |
| 1st quarter payment (due 4/17/07) | | | | |
| 2nd quarter payment (due 6/15/07) | | | | |
| 3rd quarter payment (due 9/17/07) | | | | |
| 4th quarter payment (due 1/15/08) | | | | |

| | | | | |
|-----------------------------------|--|--|--|--|
| Additional Estimated Tax Payments | | | | |
| | | | | |
| | | | | |
| | | | | |

| | | | | |
|--|--|--|--|--|
| Paid with extension (not later than 4/15/08) | | | | |
|--|--|--|--|--|

State

| | Amount Paid | Date Paid | TS | 2007 Voucher Amount |
|---|-------------|-----------|----|---------------------|
| Overpayment applied from 2006 | | | | |
| 1st quarter payment (due 4/17/07) | | | | |
| 2nd quarter payment (due 6/15/07) | | | | |
| 3rd quarter payment (due 9/17/07) | | | | |
| 4th quarter payment (due 1/15/08) | | | | |

| | | | | |
|-----------------------------------|--|--|--|--|
| Additional Estimated Tax Payments | | | | |
| | | | | |
| | | | | |
| | | | | |

| | | | | |
|--|--|--|--|--|
| Paid with extension (not later than 4/15/08) | | | | |
|--|--|--|--|--|

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 | |

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Direct Deposit & Estimates (Form 1040 ES) (cont.)

7.1

Please enter all pertinent 2007 information.

APPLICATION OF 2007 OVERPAYMENT (7.1)

If you have an overpayment of 2007 taxes, do you want the excess refunded? or applied to 2008 estimate?

Other (please explain): _____

2008 ESTIMATED TAX INFORMATION

Do you expect your 2008 taxable income to be different from 2007? Yes No

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

Do you expect your 2008 withholding to be different from 2007? Yes No

If "yes" explain any differences: _____

Hash Total

7.1

| | | | | |
|-------------|-------------|-----------|---|-----------------------|
| 2007 | 1040 | US | Wages, Pensions, Gambling Winnings | 10, 13.1, 13.2 |
|-------------|-------------|-----------|---|-----------------------|

Please enter all pertinent 2007 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 | | | | | 2006 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 12/31/07 | 2006 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 | Tax Withheld | | 2006 Winnings |
|-----|---------------|----------|----------------|---------------------|-------------------|---------------|
| | | | | Federal Withholding | State Withholding | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

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

| | | | | |
|--|--------------------|----------|----------|--------------------|
| | 2007 Amount | T | S | 2006 Amount |
| Total gambling losses | | | | |
| Winnings not reported on Form W-2G | | | | |

10, 13.1, 13.2

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Miscellaneous Income

14.1

Please enter all pertinent 2007 amounts and attach all 1099-MISC, SSA-1099, and RRB-1099 forms. Last year's amounts are provided for your reference.

MISCELLANEOUS INCOME

| | 2007 Amount | | 2006 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

Please enter all pertinent 2007 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=investment | | |
| 1=minister's Schedule C | | |

INCOME

| | 2007 Amount | 2006 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 | | |

Please enter all pertinent 2007 amounts. Last year's amounts are provided for your reference.

EXPENSES

| | 2007 Amount | 2006 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.

Please enter all pertinent 2007 information. Last year's amounts are provided for your reference.

TRADITIONAL IRA CONTRIBUTIONS

| | 2007 Amount | | 2006 Amount | |
|---|-------------|--------|-------------|--------|
| | Taxpayer | Spouse | Taxpayer | Spouse |
| IRA contributions you made or expect to make (1=maximum) (\$4,000/\$5,000 if 50 or older) | | | | |
| Contributions made to date | | | | |
| 1=covered by plan, 2=not covered | | | | |
| 2007 payments from 1/1/08 to 4/15/08 | | | | |

ROTH IRA CONTRIBUTIONS

| | 2007 Amount | 2006 Amount |
|--|-------------|-------------|
| | Taxpayer | Spouse |
| Roth IRA contributions you made or expect to make (1=maximum) (\$4,000/\$5,000 if 50 or older) | | |
| Contributions made to date | | |

SEP, SIMPLE AND QUALIFIED PLANS (KEOGH)

| | 2007 Amount | | 2006 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

| | 2007 Amount | | 2006 Amount | |
|---|-------------|--------|-------------|--------|
| | Taxpayer | Spouse | 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) | | | | |
| Tuition and related expenses (accredited post secondary institutions) (1098-T, box 1) * | | | | |
| Jury duty pay given to employer | | | | |
| Expenses from rental of personal property | | | | |
| Other adjustments to income: | | | | |
| _____ | | | | |
| _____ | | | | |
| _____ | | | | |

| | 2007 Amount | | 2006 Amount | |
|----------------------------------|-------------|--------|-------------|-----------|
| | Taxpayer | Spouse | Taxpayer | Spouse |
| Alimony paid: | | | | |
| Recipient's first name | | | | |
| Recipient's last name | | | | |
| Recipient's SSN | | | | |
| Amount paid | | | | |
| | | | 2006 amt: | 2006 amt: |

Please enter all pertinent 2007 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.

| | 2007 Amount | TS | 2006 Amount |
|--|-------------|----|-------------|
| Prescription medicines and drugs | | | |
| Doctors, dentists and nurses | | | |
| Hospitals and nursing homes | | | |
| Insurance premiums not entered elsewhere (excl. long-term care & amts. paid w/pre-tax dollars) | | | |
| Long-term care premiums - taxpayer | | | |
| Long-term care premiums - spouse | | | |
| Insurance reimbursement (enter as a positive number) | | | |
| Lodging and transportation: | | | |
| Out-of-pocket expenses | | | |
| Medical miles driven | | | |
| Other medical and dental expenses: | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |

TAXES PAID (State and local withholding and 2007 estimates are automatic.)

| | | | |
|--|--|--|--|
| State income taxes - 1/07 payment on 2006 state estimate | | | |
| State income taxes - paid with 2006 state extension | | | |
| State income taxes - paid with 2006 state return | | | |
| State income taxes - paid for prior years and/or to other state | | | |
| City/local income taxes - 1/07 payment on 2006 city/local estimate | | | |
| City/local income taxes - paid with 2006 city/local extension | | | |
| City/local income taxes - paid with 2006 city/local return | | | |

SALES AND USE TAXES PAID

| | | | |
|---|--|--|--|
| State and local sales taxes | | | |
| Use taxes paid on 2007 purchases | | | |
| Use taxes paid with 2006 state return | | | |
| Taxes paid on vehicles, boats, and aircraft | | | |

OTHER TAXES PAID

| | | | |
|---|--|--|--|
| Real estate taxes - principal residence: | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |
| Real estate taxes - property held for investment | | | |
| Personal property taxes (including automobile fees in some states. Provide a copy of tax notice) .. | | | |
| Foreign income taxes | | | |
| Other taxes: | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |

Please enter all pertinent 2007 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:

2007 Amount

TS

2006 Amount

Table with 3 columns: 2007 Amount, TS, 2006 Amount. Includes lines for home mortgage interest and points 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: 2007 Amount, TS, 2006 Amount. Includes lines for points not reported on Form 1098.

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

Investment interest (interest on margin accounts):

Table with 3 columns: 2007 Amount, TS, 2006 Amount. Includes lines for mortgage insurance premiums, investment interest, passive interest, and 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: 2007 Amount, TS, 2006 Amount. Includes lines for contributions by cash or check, volunteer expenses, and charitable miles for churches, schools, hospitals, etc.

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

Contributions by cash or check:

Table with 3 columns: 2007 Amount, TS, 2006 Amount. Includes lines for contributions by cash or check, volunteer expenses, and charitable miles for veterans' organizations, etc.

Please enter all pertinent 2007 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):

Four horizontal lines for entering 2007 amounts.

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 4 rows.

30% limitation (see above):

Four horizontal lines for entering 2007 amounts.

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 4 rows.

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

Four horizontal lines for entering 2007 amounts.

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 4 rows.

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

Four horizontal lines for entering 2007 amounts.

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 4 rows.

MISCELLANEOUS DEDUCTIONS (subject to 2% AGI limit)

Union and professional dues.....

Table with 3 columns: 2007 Amount, TS, 2006 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 2007 amounts.

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 5 rows.

Investment expense:

Five horizontal lines for entering 2007 amounts.

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 5 rows.

Tax return preparation fee.....

Safe deposit box rental.....

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 2 rows.

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

Five horizontal lines for entering 2007 amounts.

Table with 3 columns: 2007 Amount, TS, 2006 Amount. 5 rows.

Please enter all pertinent 2007 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

| | 2007 Amount | 2006 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"/> |
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| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Please enter all pertinent 2007 amounts. Last year's amounts are provided for your reference.

VEHICLE INFORMATION

| | 2007 Amount | 2006 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 | | |
| 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 | | |
| 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)..... | | |