

2010	1040	US	Tax Organizer
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Tax Return Appointment

Date:
Time:

This tax organizer will assist you in gathering information necessary for the preparation of your 2010 tax return. Please enter any NEW or CHANGED information.

CLIENT INFORMATION

Taxpayer

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		
Home phone		
Work phone		
Work extension		
Cell phone		
E-mail address		

Address

In care of
 Street address
 Apartment number
 City
 State
 ZIP code

DEPENDENTS

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number . .		
Relationship		
Months lived at home		

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number . .		
Relationship		
Months lived at home		

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Please enter all pertinent 2010 information. If you have attached a government form for an item, check the box and do not enter a 2010 amount.

WAGES, SALARIES AND TIPS

Employer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms W-2	_____

INTEREST INCOME

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-INT	_____

DIVIDEND INCOME

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-DIV	_____

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-R & W-2G	_____

Winnings not reported on W-2G.
 Total gambling losses.

_____	_____
_____	_____

OTHER GOVERNMENT FORMS - INCOME

<input type="checkbox"/>	Form 1099-B - Sales of stock (also include transaction history).....
<input type="checkbox"/>	Form 1099-MISC - Miscellaneous income.....
<input type="checkbox"/>	Form 1099-S - Sales of real estate (also include closing statements).
<input type="checkbox"/>	Form 1099-G - State tax refunds.

Attach Forms 1099

Attach Forms 1099

Taxpayer:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....

Attach Forms 1099

Spouse:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....

Attach Forms 1099

MISCELLANEOUS INCOME

Taxpayer: Alimony received

Spouse: Alimony received.....

Other: _____

_____	_____
_____	_____
_____	_____

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Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2010, please check the appropriate box and provide additional information if necessary.

YES

NO

PERSONAL INFORMATION

Did your marital status change during the year?

Did your address change during the year?

Could you be claimed as a dependent on another person's tax return for 2010?

DEPENDENTS

Were there any changes in dependents?

Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2010?

Did you have any children under age 19 or full-time students under age 24 at the end of 2010, with interest and dividend income in excess of \$950, or total investment income in excess of \$1,900?

INCOME

Did you receive unreported tip income of \$20 or more in any month?

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?

Did you receive any disability income?

Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

Did you buy or sell any stocks, bonds or other investment property in 2010?

Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2011?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

Did you purchase a main home before October 1, 2010 (entering into a binding contract before May 1, 2010) and you (and your spouse) did not own any other home during the 3-year period ending on the date of purchase?

Did you purchase a main home before October 1, 2010 (entering into a binding contract before May 1, 2010) which replaced a main home that you (and your spouse) maintained for 5 consecutive years during the 8-year period before this latest purchase?

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

Did you purchase a new alternative motor vehicle (hybrid, advanced lean burn, fuel cell, plug-in)?

Did you have any debts cancelled or forgiven?

Does anyone owe you money which has become uncollectible?

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Miscellaneous Questions (continued)

If any of the following items pertain to you or your spouse for 2010, please check the appropriate box and provide additional information if necessary.

YES	NO	
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 transfer or rollover any amount from one retirement plan to another retirement plan?
<input type="checkbox"/>	<input type="checkbox"/>	Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?
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?
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)?
ESTIMATED TAXES		
<input type="checkbox"/>	<input type="checkbox"/>	Did you apply an overpayment of 2009 taxes to your 2010 estimated tax (instead of being refunded)?
<input type="checkbox"/>	<input type="checkbox"/>	If you have an overpayment of 2010 taxes, do you want the excess applied to your 2011 estimated tax (instead of being refunded)?
<input type="checkbox"/>	<input type="checkbox"/>	Do you expect your 2011 taxable income and withholdings to be different from 2010?
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 2010, 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 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 \$13,000, or any gifts to a trust?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a \$250 economic recovery payment in 2010 that was made to social security recipients, railroad retirement recipients and certain veterans? Caution: Most eligible recipients received the \$250 payment in 2009 instead of 2010. Check the box only if the payment was received in 2010.
<input type="checkbox"/>	<input type="checkbox"/>	Did your spouse receive a \$250 economic recovery payment in 2010 that was made to social security recipients, railroad retirement recipients and certain veterans? Caution: Most eligible recipients received the \$250 payment in 2009 instead of 2010. Check the box only if the payment was received in 2010.
<input type="checkbox"/>	<input type="checkbox"/>	Were you (or your spouse) the beneficiary of COBRA premium assistance for any month during 2010?

KEVIN E. LEWIS, EA
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Tax Return Preparation Engagement Letter

Thank you for choosing Kevin E Lewis, EA to assist you with your tax return. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we provide.

We will prepare your federal and state income tax returns for each year for which this service is requested. We will depend on you to provide the information we need to prepare complete and accurate returns. We do not audit the data you submit, although we may request clarification of the information from you. Organizers and worksheets are available on our website to help you avoid overlooking important information. By using them, you will contribute to efficient preparation of your returns and help minimize the cost of our services.

We will use our judgment in resolving questions where the tax law is unclear or where there may be different interpretations of the law, and try to resolve such questions in your favor if there is reasonable justification for such a position. Unusual positions may be noted on your tax return receipt. Our work does not include procedures to find irregularities, but we will inform you of any material errors, fraud, or other illegal acts we discover.

Taxing authorities, by regulation, require you to retain information substantiating all items reported on your returns. You should retain your tax return records and returns for a minimum of three (3) years after the filing date. Your returns are subject to review (audit) or you may receive requests for additional information from the tax authorities. If your return is selected, it does not mean there is a problem. In your interest, it is advisable to contact us immediately upon receiving correspondence from the taxing agency. We may be available to assist or represent you if an examination occurs, charging additional fees based on a standard hourly rate then in effect. Audit services are not a part of this engagement. If your return is selected for audit, it is important for you to realize that you are solely responsible for providing the documents and other substantiation to the tax authorities.

If there are errors on the returns prepared from the data you provided to us, we cannot be held liable for the payment of the additional tax that would have been properly due on the original returns, or for the interest charged by the taxing agency as you have had use of the money. However, we may be liable for any penalties charged as a result of the incorrect payment of tax when the penalty results from an error in the preparation of the return by us, except in the case of questionable or unusual positions that you have taken in the preparation of your return. In any event, you agree that our firm's liabilities will be limited to the amount of fees paid to us for services in the preparation of your return. In the event of a dispute between preparer and taxpayer, we agree to resolve through mediation.

Fees for our services are generally computed according to the "Schedule of Charges" in effect at the time that the return is prepared, and are due prior to the filing of your return. We do, however, reserve the right to ask for retainer fees to be paid in advance of any work performed. Payments more than thirty (30) days late may be subject to a late fee of 1% per month. If your account is turned over to a collection service, you agree to pay any and all collection costs. Any bookkeeping, audit or other services needed to complete the tax return will be additional cost.

This engagement letter shall remain in force from year to year until canceled by your failure to request the preparation of the income tax returns of a subsequent year, or by written notice from us prior to the end of the tax year for which return preparation is declined. We reserve the right to perform no work unless we have a signed engagement letter in our possession.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of the this letter in the space below. We appreciate your confidence in us.

Print Name _____ Signature/Date _____ REV. 1/2011

Privacy Notice

We value our clients, and their privacy is important to us. Please read our privacy policy below.

We collect nonpublic personal information about our clients from various sources, including the following:

- * Information we receive from interviews regarding clients' tax situations
- * Information we receive on applications, organizers, or by other means, such as client names, addresses, telephone numbers, Social Security Numbers, dependents, income, and other tax-related data
- * Information from tax-related documents that we require from clients in order to process their tax returns (Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions, etc.)

We do not disclose any nonpublic personal information about our clients or former clients to anyone except as requested by our clients or as required by law.

We restrict access to nonpublic personal information concerning our clients except to employees who need access to such information in order to provide products or services. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard all nonpublic personal information.

For questions about our privacy policy, please contact us.

Sincerely,

Kevin E Lewis, EA