

**taxCPAdirect – Your Online CPA Firm**

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Web: [www.taxCPAdirect.com](http://www.taxCPAdirect.com)  
Email: [info@taxCPAdirect.com](mailto:info@taxCPAdirect.com)  
Phone: 888-440-4675  
Fax: 925-226-4032

## **Summary of Supporting Documents to Send eOrganizer for the 2008 Tax Year**

**Summary of Supporting Documents Clients Should Send Us**

The purpose of this document is to provide a summary of supporting documents clients should send us for each item checked “Yes” in the eOrganizer. For complete instructions on the eOrganizer and what supporting documents to send us, see Instructions to the eOrganizer at our [Download](#) page.

**Do not send us originals;** send us only copies. Keep your originals for at least three years in case of an audit.

<u>eOrganizer Line Item</u>	<u>Supporting Documents to Send Us</u>
<b>Income Information</b>	
<input type="checkbox"/> * W-2 Wages	Form W-2
<input type="checkbox"/> * Interest	Form 1099-INT or equivalent
<input type="checkbox"/> * Dividend	Form 1099-DIV or equivalent
<input type="checkbox"/> * Sale of Stocks, Mutual Funds, or Bonds	Form 1099-B or equivalent
<input type="checkbox"/> * Social Security or Disability Benefits	Form SSA-1099 or equivalent
<input type="checkbox"/> * Retirement Benefits	Form 1099-R or equivalent
<input type="checkbox"/> * State & Local Refunds	Form 1099-G or equivalent
<input type="checkbox"/> * Self Employment Income	Profit and loss statement (Business Income Worksheet is available for your use at our Download page if you do not already have such statement)
<input type="checkbox"/> * Rental Income	Profit and loss statement (Rental Income Worksheet is available for your use at our Download page if you do not already have such statement)
<input type="checkbox"/> * Income from Partnership or S-Corporation	Schedule K-1
<input type="checkbox"/> * Unemployment Compensation	Form 1099-G or equivalent
<input type="checkbox"/> * Sale of Primary Residence	Form 1099-S, closing statements, list of improvements made to the house
<input type="checkbox"/> * Canceled Debt	Form 1099-A, Form 1099-C, or equivalent
<input type="checkbox"/> * Alimony	Divorce degree
<input type="checkbox"/> * Gambling Winnings, Prizes, and Awards	Form W-2G
<input type="checkbox"/> * Other Income	Relevant supporting documents (contact us if you need help with identifying the documents we need)

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**Documents to Send – 2008 eOrganizer**

<b>Deductions &amp; Credits</b>	
<input type="checkbox"/>	* Home Mortgage Interest and Real Estate Taxes Form 1098, annual property tax statement, or equivalent
<input type="checkbox"/>	* Charitable Contributions None
<input type="checkbox"/>	* Sales Taxes Paid None
<input type="checkbox"/>	* Child and Dependent Care Expenses None
<input type="checkbox"/>	* Medical Expenses None
* Other Expenses	
<input type="checkbox"/>	- Significant & Unreimbursed Casualty or Theft Losses Relevant supporting documents, if any
<input type="checkbox"/>	- Moving Expenses Resulting from Change of Job List of all moving expenses incurred, including costs for packing and shipping your household goods and personal property, and costs for travel and lodging. Meals are not deductible as a moving expense.
<input type="checkbox"/>	- Purchase of Hybrid Vehicles Date of purchase, model and maker
<input type="checkbox"/>	- Higher Education Expenses (Tuition) Annual statement from your educational institution
<input type="checkbox"/>	- Student Loan Interest Form 1098-E or equivalent
<input type="checkbox"/>	- Personal Property Taxes – Auto & Boat Relevant supporting documents, if any
<input type="checkbox"/>	- Alimony Paid Divorce decree and the amount paid in the tax year
<input type="checkbox"/>	- IRA/Keogh/SEP Contributions Amount of tax year contributions
<input type="checkbox"/>	- HSA/MSA Contributions Amount of tax year contributions
<input type="checkbox"/>	- Adoption Expenses Amount of adoption expenses and relevant supporting documents
<input type="checkbox"/>	- Household Worker (Nanny, Maid, etc.) Name and SSN of the household worker, and amount paid during the tax year
<input type="checkbox"/>	- Other Expenses/Deductions Relevant supporting documents, if any

**\*\* ALL NEW CLIENTS: Please send us a copy of your 2007 federal and state tax returns.**

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**Documents to Send – 2008 eOrganizer**

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Please send us your supporting documents as soon as possible as we are not able to complete your tax returns without them. There are three different ways you can send us your documents:

- a) Scan your tax documents and email them as attachments to [taxdocs@taxcpadirect.com](mailto:taxdocs@taxcpadirect.com)
- b) Fax them to 925-226-4032
- c) Or mail them to:

taxCPAdirect  
P.O. Box 20835  
Castro Valley, CA 94546

We will start preparing your tax returns upon receipt of your eOrganizer and supporting documents. While preparing your returns, we may contact you to ask questions. If certain tax information or supporting document is missing, we will be sure to let you know. Once we have all required information, we will process and finalize your returns and make them available for your review within three business days.

If you have any questions or concerns, please do not hesitate to contact us at [info@taxcpadirect.com](mailto:info@taxcpadirect.com).