TAX ORGANIZER

FROM: Edward Bray Consulting Coimpany

TO: _____

Did you know that you can save $31 in taxes for every $100 in deductible items (if you are in the 28% Federal and 3% State income brackets)? You will save even more money in tax-preparation fees if your tax information is complete and organized. Please help us prepare your return more efficiently by taking the time to complete this Tax Organizer before your scheduled appointment.

The Organizer contains several sections that include common expenses and deductions that many taxpayers overlook. Please review these carefully and feel free to add any notes or questions that might help us find ways to save you money.

Enter all relevant information in the designated areas on each page. If you need to include additional information, you may use the back of a page or attach additional pages.

Also, provide detailed information if you answer "YES" to any of the "GENERAL" or "BUSINESS" and "INVESTMENT" questions. This information can be a significant time-saver.
When you arrive for your appointment, please bring copies of the following, if applicable:

	Last year's tax return (if not in our possesion)
	Original Form(s) W-2
	Schedule(s) K-1 from partnerships, S-corporations, estates or trusts
	Documentation of pension or other compensation
	Form(s) 1099 or statements reporting dividend and interest income
	Form(s) 1098 and copies of real estate tax bills, etc
	Legal documents pertaining to the close of sale (or purchase) of real property

Thank you for your cooperation. Please call if we can be of any further assistance to you.

Your Tax Appointment is : Day: _____

Date: _____

Time: _____

For direct deposit of your Federal Income Tax refund please enter the numbers as they appear on the bottom of your check

_____ _____

Routing # (Must be 9 digits) Account number