Tax Crew
10 Santa Clara
San Clemente CA 92672
p: 949.234.0095
f: 949.309.2902
info@mytaxcrew.com
www.mytaxcrew.com
www.goDiem.com

Happy 2016!

We hope 2015 has been a happy and successful year for you. Enclosed is your tax organizer which we will use in preparing your tax return. As you receive your tax documents, please collect them and keep them with this organizer. This year we're offering several new initiatives to streamline the process of gathering and submitting your tax information. If you're interested in saving time, paper and postage, feel free to utilize any or all of the following options:

- ✓ **E-ORGANIZER -** Rather than completing your paper tax organizer by hand and mailing it back to us, you can submit your organizer information electronically online. This feature will be available January 3. Just visit www.mytaxcrew.com. Under 'Tax Center', select 'E-Organizer'.
- ✓ **SMARTVAULT -** We'll email you a link to our new client portal in early January. This is a secure, convenient way to exchange information with us anytime, anywhere. You can scan or snap and upload your tax documents and paper organizer. You'll also be able to retrieve copies of your completed tax returns whenever you want. SmartVault meets compliance and security requirements of the: Gramm-Leach-Bliley Act (GLBA); Financial Industry Regulatory Authority (FINRA); Security and Exchange Commission (SEC) 17A and Health Insurance Portability and Accountability Act (HIPAA).
- ✓ **FINANCIAL INSTITUTION DOWNLOAD -** With over 270 financial institutions (Including brokerages, banks and credit unions) and more than 45 W-2 payroll processors (including W-2 providers for most airlines) participating, this is the easiest, most secure way to send us your 1099s and W-2s. We'll email you your individual link for this portal about January 19.
- ✓ **PAPERLESS FLIGHT HISTORY TRANSFER** - American flight attendants, Delta flight attendants and Delta pilots can now email us your flight information in a few seconds with just a couple of clicks. Check out the enclosed *Crew Log* for more information. We also have auto-transfer options available for Hawaiian, SkyWest and United (s-CO) crewmembers.
- ✓ **E-SIGNATURE -** The IRS requires an e-file signature authorization to be completed each year. To save you time and get your refund to you more quickly, we'll email you a request for authorization once your return is complete. The authorization can now be completed electronically from any computer, tablet or mobile device. E-Signature is fully IRS compliant and uses the same security protocols and encryption levels used by banks, credit card companies and financial institutions.

Thank you for choosing Tax Crew to prepare your return. Please contact us if you have any questions. Be sure to visit us online at www.mytaxcrew.com for the latest tax news, monthly newsletters, financial planning calculators and much more.

We wish you all the best for a peaceful, healthy and happy New Year.

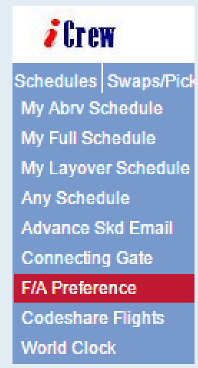
Tax Crew/GoDiem

Crew Log

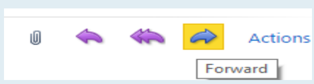
Per Diem Reports are Now Easier Than Ever

Since 1990, our Per Diem Reports have saved flight attendants and pilots millions of tax dollars. Now, getting your flight information to us is faster and easier than ever.

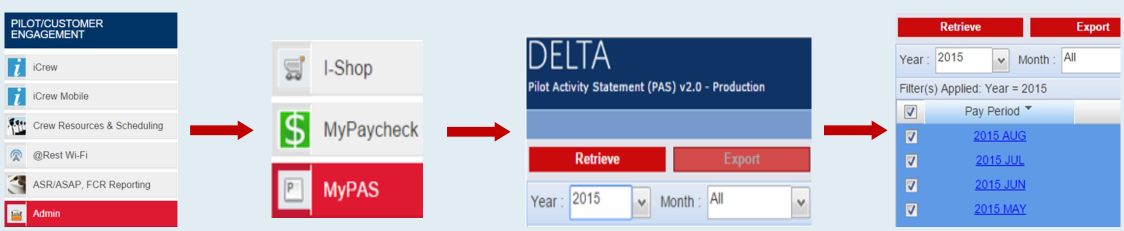
Delta Air Lines and American Airlines have an easy way to send your entire flight history to us electronically. The process is simple, quick and saves you paper and postage. Just follow these easy instructions for your airline:



Delta Flight Attendants: Sign into iCrew and from the **'Schedules'** drop-down, select **'F/A Preference'**. On the next page, click **'Schedule Leg Data Extract'**. You'll see two options: 'Send Schedule Leg Data to vendor' and **'email Schedule Leg Data to your company account.** Enter **'YES'** for this (second) option and click the 'OK' button. You'll receive confirmation that the file was sent. It may take several minutes to appear in your company email account. **Log in to your company email.** You'll receive an email that says 'Schedule Leg Data'. **Forward** the email to **info@godiem.com.** In the body of the email mention that you're a tax client, so we can match your per diem report with your tax file. That's all there is to it! We'll do the rest.



Delta Pilots: On DeltaNet, select **'Admin'** from the **'Pilot/Customer Engagement'** menu. On the Admin page, navigate to **'MyPAS'**. Select the tax **year** and **'All'** for the month. Click the **'Retrieve'** button. Click the checkbox next to **'PayPeriod'** (this will check all the months). Click the **'Export'** button to create a compressed file that you can save to your computer. Email that file to **info@godiem.com** and let us know that you're a tax client. You're all set! We'll take it from there.



American Flight Attendants: In JetNet, navigate to the **Flight Service** page. On the **Options** menu, select **Tools & Links**. Click the checkbox next to the **year** (this will select all months). Click the **'get seq data'** button to retrieve your flight information. Enter your **email address** and click the **'email'** button. Forward the email you receive from JetNet to **info@godiem.com** and mention that you're a tax client. We'll get your per diem report calculated and match the file with your tax information. It's that simple!

Need Help? Call us at 949.234.0095
Or email us at info@godiem.com

THE BEST PER DIEM REPORTS JUST GOT EVEN BETTER!

Paperfree options are now available for:

American flight attendants, Delta flight attendants and Delta pilots.

Our goBot app is available for Hawaiian, SkyWest and United (s-CO) crewmembers at www.godiem.com.

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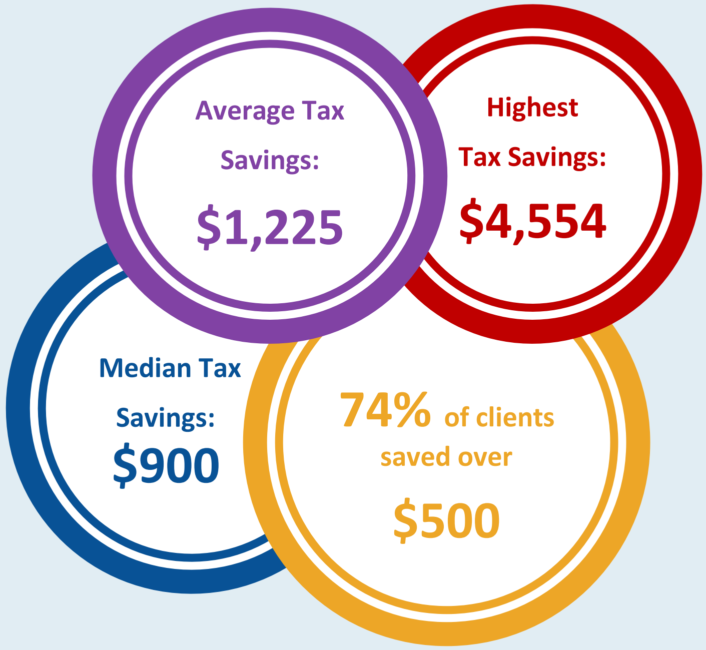
The Power of Per Diem . . .

Tax Crew/GoDiem reports saved clients:

We know you work hard for your money and your time is valuable. We work hard to save you both. One way we do that is to provide you an industry leading per diem report, so you're guaranteed the largest legal tax deduction for your layover meal expenses.

Individual tax savings depend on a variety of factors, such as tax bracket, filing status, other deductions, etc., but here are some numbers on what our clients save in tax dollars with our per diem reports.



Statistics based on random sample of 1,000 GoDiem/Tax Crew clients. Figures reflect federal tax savings only. State income tax savings (in addition to above amounts) are also realized by residents of AL, AZ, AR, CA, DE, GA, HI, ID, IA. KS, KY, LA, MA, MD, ME, MN, MO, MS, MT, NC, ND, NY, OK, OR, SC, UT, VA.

Tax Crew/GoDiem Exclusives

Since 1990, our Per Diem Reports have saved flight attendants and pilots over $173 million in federal, state and local income taxes (compared to not claiming the per diem deduction). We pioneered the per diem deduction over 25 years ago and have set and maintained the standard ever since, in order to guarantee you the largest legal tax deduction for your layover meal expenses. The best part is, you don't have to keep any receipts or logs to support your tax deduction. Our reports maximize your tax deduction and minimize your paperwork.

We've maintained our industry leading position with:

⇒ 100% IRS approval of our Per Diem Reports

⇒ An exclusive algorithm that accurately calculates the highest deduction for your specific trip history.

⇒ Free full representation if your report is audited by the IRS or a state tax agency.

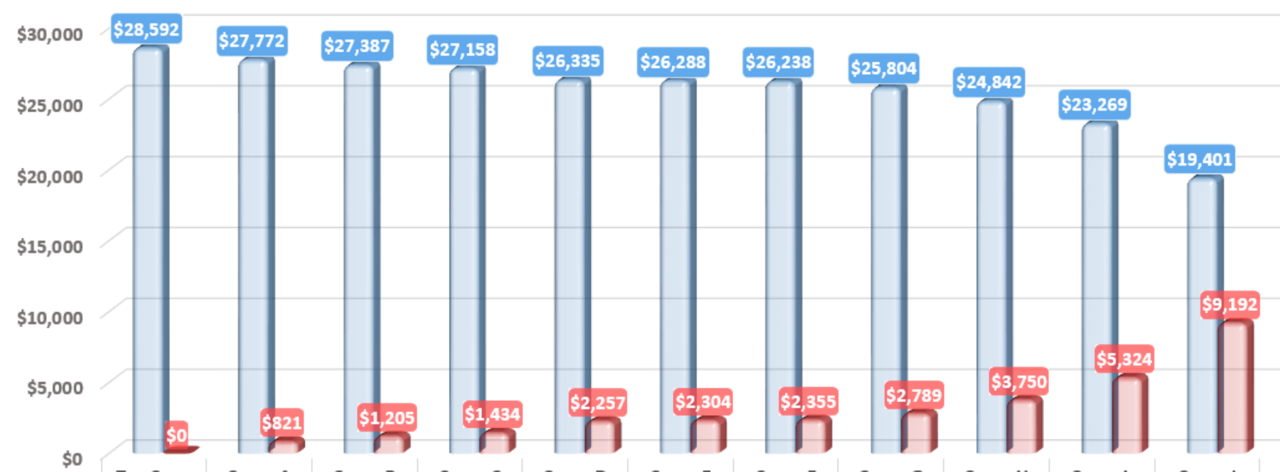
Compared to . . .

We recently sent the identical flight data to 10 different per diem companies and bought their reports. Using the same flight data, our report calculated a higher deduction than all 10 of our competitors' ($28,592 on our report versus competitor reports that ranged from $19,401 to $27,772).

Each $100 difference between our report and their report saves you between $15 - $39 in reduced income taxes (or increased tax refund), based on your tax bracket.

Using another per diem report can cost you hundreds of unnecessary tax dollars each year.

Tax Crew/GoDiem Competitive Set



	Tax Crew GoDiem	Comp A	Comp B	Comp C	Comp D	Comp E	Comp F	Comp G	Comp H	Comp I	Comp J
Report Total	$28,592	$27,772	$27,387	$27,158	$26,335	$26,288	$26,238	$25,804	$24,842	$23,269	$19,401
Ours is higher by	$0	$821	$1,205	$1,434	$2,257	$2,304	$2,355	$2,789	$3,750	$5,324	$9,192

Newsletter, Tax Updates & More Online.

Visit www.mytaxcrew.com for the latest tax news , monthly newsletters, tax refund status, financial planning calculators and much more.

Our **monthly newsletter** (Tax Center > Newsletter) delivers the latest tax news, updates on tax law changes, timely reminders, tax savings tips and periodic reviews.

You'll find our **Financial Calculators** under the Resources tab. These interactive calculators help empower your financial planning. They allow you to construct various economic scenarios and compare outcomes in personal finance, retirement planning, home ownership, vehicle financing, savings, investments and business planning.

The Resources tab also provides links to **check your refund** status for the IRS and state tax agencies.

Refer a Friend

Our best advertising is a personal referral. For every new tax client you refer to Tax Crew, we'll send you a check for $25 as our thank you. Tell your friends to include your name in the *Referred by* box on the front of the tax organizer.

For Per Diem Report referrals, visit www.goDiem.com to set up a referral account and generate a discount code that you can share with friends and colleagues. They'll get a discount and you'll earn a commission!

Tax Crew Tax Organizer

Thank you for choosing Tax Crew. Please complete the sections of the Organizer that apply to you and mail the organizer and copies of your applicable forms (W-2s, 1099s, etc.) to the address below. You can also fax your information to us at 949-309-2902, email it to us at info@mytaxcrew.com or upload it via our SmartVault File Transfer portal (just send us an email and will set up a link to the portal for you).

New Clients: Please include a copy of your most recent tax return with your organizer.

New Clients: Who referred you to Tax Crew?			
Electronic Filing	To provide you better service and speed the processing of your refund, once we finish work on your return, we'll email you an eSignature form to authorize filing of your return. IRS requires completion of this form before we file your return. You can complete the eSignature with any computer, tablet or mobile device. There's nothing to download or print. Please make sure to include a valid email address below.		
Authority to discuss your return with IRS	Tax preparers may discuss return preparation, refund and payment issues with the IRS on your behalf.	If you authorize Tax Crew to discuss these matters for you, please initial here:	

A. Personal Information

	Name (as it appears on your Social Security Card)	Social Security	Occupation	Birth date	Pres election campaign fund
Taxpayer					Yes ❑ No ❑
Spouse					Yes ❑ No ❑

Tax Address – address in the state where you pay state income taxes.	
Mailing Address – where you want us to mail correspondence if different than above.	

Home phone	Cell phone	Fax	Best method/time to contact you

Email address		Check here to receive tax news by email. ❑

Direct Deposit	For direct deposit of your refund, please include a voided check or include bank information:			
Routing Transit Number		Full account number		Checking ❑ Savings ❑

Filing Status

❑ Single	❑ Married Filing Jointly	❑ Qualifying Widow(er)	Spouse's date of death	

❑ Married Filing Separately	Spouse name		Spouse Social Security number	
	Did you live with your spouse any time after June 30? Yes ❑ No ❑			

❑ Head of Household - If you are the custodial parent, but someone else is claiming the exemption, complete this section. List other dependents in Section B.	Name		SSN		No. mos living w/you	
	Relationship		Who is claiming this exemption			

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B. Dependent Information

Name (as on Social Security card)	SSN	Birth Date	Relationship	Mos at home in	Income >$3650?	Code+
					Yes ❑ No ❑	
					Yes ❑ No ❑	
					Yes ❑ No ❑	
					Yes ❑ No ❑	

+Codes L=Dependent who lived with you; CN=Child who did not live with you due to divorce or separation (include copy of Form 8332 or divorce decree); Y=Child was a full time student for at least 5 months and age 19-24; O=Other dependent (other than child) who did not live with you.

C. General Questions

Do you have children under age 24 with investment income over $1900? If yes, please attach 1099s.	
Did you have any debts cancelled, forgiven or refinanced? If yes, include any 1099-Cs you received.	
Did you have any bank or financial accounts in foreign countries with a combined value over $10,000?	

New Clients – please include a copy of your prior year income tax return. Or if you don't have a copy, please complete this section.

Which form did you file last year?	1040 ❑ 1040A ❑ 1040EZ ❑		
Amount of last year's Federal refund		Amount of last year's State refund	
Or additional Federal tax due		Or additional State tax due	

D. Miscellaneous Income

Unemployment compensation		Alimony received	
Social Security income		Other	

E. Adjustments to Income

Traditional IRA Contributions		If you previously filed Form 8606 (non-deductible IRA contributions) enter amount on Line 12 of last 8606 of filed	
Roth IRA Contributions		Contributions to Self Employed Retirement Plan made for	

Alimony payments		Name and Social Security Number of recipient	

Retirement Plan Distributions, Rollovers, Recharacterizations

401(k)/Traditional IRA	Distribution	Distribution	Distribution	Distribution
Name of payer				
Gross distribution				
Distribution date				
Basis in account (non-tax deductible contributions)				
Amount of prior distributions				
Reason for distribution (first home purchase, higher education costs, converted to Roth IRA, etc)				
Amount rolled over				
Name of receiving institution				
New account type (Roth, Traditional Ira)				
Roth IRA				
Name of payer				
Gross distribution				
Distribution date				
Reason for distribution				
Basis in account (your contributions)				
Amount of prior distributions				
Value of account on December 31				

F. Interest Income (please enclose copies of interest statements)

Institution	Amount	Institution	Amount

G. Dividend Income (please enclose copies of dividend statements)

Institution	Box 1a Dividends	Box 1b Qualified Dividends	Box 2A Capital Gains	Box 2B 28%	Box 2C Qual. 5yr gain	Box 6A Foreign tax

H. Child Care Credit

Provider's Name and Address	Tax ID or Social Security #	Care provided for:	Amount paid

I. Education Savings Accounts

For contributions made on or before 12/31		Student/Beneficiary	Amount
Coverdell Education Savings Plan			
Coverdell Education Savings Plan			
State College Savings 529 Plan	St. Plan:		
State Prepaid Tuition Program	St. Plan:		

J. Education Deductions and Credits - Please include Form 1098-T. Schools typically provide this form online and don't mail a copy.

You may claim a deduction or credit for qualified tuition and related expenses you pay for yourself, your spouse, or a dependent for whom you claim an exemption on your tax return. Married taxpayers must file a joint return to qualify. Qualified expenses include tuition and fees required for enrollment or attendance at an eligible educational institution and expenses paid for books, supplies and equipment needed for a course of study. Taxpayers may not claim both the deduction and the credit for the same student. Based on the information you provide below, we'll determine which provides your greatest tax benefit.

Student's Name			
School Name			
School City and State			
Qualified expenses paid			
Year in college (1st, 2nd, 3rd, 4th)			
At least half-time student?	Yes☐ No☐	Yes☐ No☐	Yes☐ No☐
Amount of 529 Plan withdrawal			

Educator Expenses

Classroom expenses incurred by educators teaching kindergarten through 12th grade	

K. Medical Expenses

Do not include amounts reimbursed by insurance or flexible savings accounts. Your out of pocket expenses must be over must be over 7.5 percent of your income to be deductible. Some states also allow a medical deduction. Disability and Accident insurance premiums are not deductible.

Prescriptions/co-pays		Physician, Dentist, Chiropractor fees/co-pays	
Contacts/Glasses		Lab/Hospital Fees/co-pays	
Insurance Premiums - Do not include pretax		Counseling/Psychotherapy fees/co-pays	
COBRA premiums		Other transportation/lodging costs	
Medical Travel—Miles driven		Other medical expenses	

L. Tax and Interest Expenses

State Sales Tax - You have the option of claiming your state income tax or your state sales tax paid as an itemized deduction on your federal return. The sales tax deduction typically benefits taxpayers who live in states without a state income tax. If you claim the state sales tax, you have the option of claiming the standard allowed per the IRS tables, according to your income and state sales tax rate (which we can calculate) plus major purchases (car, boat, aircraft, RV), or claiming total actual sales taxes paid for the year.

Sales tax paid on auto, RV, boat, aircraft purchase in		Sales tax paid on all other purchases in	
Additional taxes paid with last year's state or local return		Real Estate taxes on principal residence	
Auto License (portion based on value of the car)		Real Estate taxes paid on additional homes/land	
Other personal property taxes		Mortgage interest on principal residence	

Investment interest (e.g. margin interest)		2nd Mortgage/home equity loan	
Points paid on home purchase		Mortgage on 2nd or vacation home	

Points paid on refinance		Date of refinance		Life of Loan (in years)	
Qualified Student Loan Interest Paid					

M. Charitable Contributions

The IRS requires receipts for any individual cash donation that is more the $250.00. Beginning with the 2007 tax year, the IRS requires a receipt or bank record (cancelled check, credit card statement, etc) for all cash donations. If your non-cash contributions (clothing, household items, etc) are greater than $500.00 for the year, please provide itemized information on the next page of this organizer. If you donated a vehicle, and are claiming a deduction greater than $500 for the vehicle, the IRS requires that we attach a copy of Form 1098-C to your return. You should receive this form from the charitable organization.

Cash contributions to qualified organizations		Number of miles driven for charitable purposes	
Parking, fees, tolls, etc paid while performing charitable service		Value of non-cash charitable contributions	

Non-Cash Contribution Itemization (include information about vehicle donations below) Please complete this section if your total non-cash contributions for the year were over $500.

Name and address of organization							
Items donated (general categories such as clothing, toys, household items, electronics)							
Date donated		Date acquired		How acquired		Cost or adjusted basis	
Fair market value at time of donation		Method used to determine value (appraisal, blue book, thrift shop value)					
Name and address of organization							
Items donated (general categories such as clothing, toys, household items, electronics)							
Date donated		Date acquired		How acquired		Cost or adjusted basis	
Fair market value at time of donation		Method used to determine value (appraisal, blue book, thrift shop value)					
Name and address of organization							
Items donated (general categories such as clothing, toys, household items, electronics)							
Date donated		Date acquired		How acquired		Cost or adjusted basis	
Fair market value at time of donation		Method used to determine value (appraisal, blue book, thrift shop value)					
Name and address of organization							

N. Miscellaneous Deductions

Tax preparation fees paid last year		Safe deposit box		IRA Custodial fees	
Tax mailing/FedEx fees		Investment publications		Other investment expense	
Investment counsel		Other expenses		Gambling losses (to extent of winnings)	

O. Moving Expenses (only list job related moves greater than 50 miles)

Distance from old home to new workplace		Distance from old home to old workplace		Moving transportation and storage costs		Travel/lodging expenses for move	
Miles driven for move		Number of cars moved		Old base		New base	

P. Estimated Tax Payments List prepayments you made on your taxes OTHER THAN W-2 or 1099 withholding.

	Date	Amount	Date	Amount	Date	Amount	Date	Amount
Federal								
State								
Local								

Q. HSA – Health Savings Account

Is your high deductible health plan for: Self only ☐ Family ☐		Total HSA distributions in :	
Total HSA contributions your employer made:		Total medical expenses that were not reimbursed:	
Total HSA contributions you made through payroll deduction:		Number of months in the plan in :	
Total HSA contributions by cash or check to your account		Was the plan in effect for December,	YES ☐ NO ☐

Questions about the tax organizer? 1.949.234.0095 or info@mytaxcrew.com

R. Small Business/Self-Employed Income

Business Name		Ownership	Taxpayer ❑ Spouse ❑ Joint ❑
Business address (if different than home address)			

Gross Income		Supplies	
Income reported to you on Form 1099 (please include copies)		Taxes and licenses	
Returns and allowances		Travel costs	
Advertising		Meals and entertainment	
Bad debts from sales or service		Telephone	
Commissions and fees		Utilities	
Depletion		Wages	
Insurance (other than health)		Other expenses	
Interest		Inventory at the beginning of the year	
Legal & professional services		Purchases less cost of items used personally	
Parking fees, tolls		Cost of labor (do not include your salary)	
Pension and profit-sharing plans		Materials and supplies	
Rent or lease a Vehicles, machinery, equipment		Other costs	
Other business property		Inventory at the end of the year	
Repairs and maintenance		Cost of goods sold	

Other business expenses – additional information

Description of asset used in business	Date placed in service	Cost or basis	Percentage business use

Vehicle Expense

The IRS requires written documentation of business miles to claim the deduction.

Vehicle year		Do you have another car available for personal use?	Yes ❑ No ❑
Make & model		Do you have evidence to support your deduction?	Yes ❑ No ❑
Date first used for business		Is this evidence written?	Yes ❑ No ❑
Number of miles driven for business		Was the vehicle leased?	Yes ❑ No ❑
Number of miles driven for commuting		Monthly lease payment	
Number of miles driven for personal use		Was your vehicle available for off-duty hours?	Yes ❑ No ❑

Actual vehicle expenses

– To claim actual vehicle expenses instead of the standard mileage rate, please complete this section

Purchase price or cost basis in vehicle		Gasoline, oil, repairs, insurance, etc.	
Section 179 expense elected		Vehicle registration, license	

Business Use of Home

Total square footage of home		Total homeowner’s/renter’s insurance premium	
Square footage of area used for exclusively for business		Total annual utilities	
Homeowners - Total home mortgage interest paid		Total real estate taxes	
Homeowners - Home purchase price/cost basis		Date you first used home office	
Renters - Annual rent paid		Number of months used as home office last year	

S. Stock, Bond, Securities Sales

We must have this following information to accurately calculate capital gains/losses. If your broker does not provide it in your yearend account statement, please contact your broker for this information. Attach sheets if necessary. Or to send this information to us electronically, send us an email and we'll set up a financial institution download for you.

Quantity and description	Purchase date	Date sold	Sales price minus commissions	Purchase price or basis including commissions

T. Rental and Royalty income

Property	Date first used as rental	Purchase Price	Cost of land	Ownership %	Address
1					
2					
3					

Property	1	2	3	Property	1	2	3
Rents received				Mgmt fees			
Advertising				Mortgage Interest			
Automobile mileage				Property Tax			
Association dues				Repairs			
Cleaning/Maint				Supplies			
Commissions				Telephone			
Insurance				Travel to property			
Legal/Prof fees				Utilities			
Number of days of personal use of property.							

Property	Property improvements, upgrades, capital expenditures	Date purchased	Cost

Sale of Rental Property: Please include copies of the purchase and sale Settlement Statements and (for new clients) copies of tax returns for the years the property was used as a rental.

U. Energy Credits

Hybrid/Alternative fuel vehicles may qualify for a tax credit if purchased after January 1, 2006, for purchases of new hybrid vehicles. Please include a copy of your Manufacturer's Certificate and sales receipt to claim your credit. Plug-in electric vehicles and plug-in electric drive conversion kits may also qualify for this credit. Purchase date: __________________________. Make & Model of car: __________________________

Residential Energy Credits are available for certain energy efficient improvements to a primary residence. Please provide a copy of the manufacturer's certificate and sales receipts if you made the following improvements:

Insulation, energy efficient windows, doors, skylights, heating/air conditioning systems, water heaters, biomass stoves or metal or asphalt roof? Yes ❑ No ❑

Alternative energy equipment, such as geothermal heat pumps, wind turbines or solar water heaters? Yes ❑ No ❑

V. Crewmember Deductions

Please enter category totals in shaded areas below. Additional itemization is provided for your convenience to illustrate the items that are deductible. The IRS requires receipts for individual expenses over $75.00. If the expense is under $75.00, the IRS accepts a logbook or journal that lists the expense, date and cost.

Non-taxable per diem (listed on your W-2 in box 12 with code 'L')	$
Transportation	
Tips for van divers	
Rental cars/taxi fares/parking	
Co-terminal transportation	
Cab/parking fares for short calls	
Transportation to training/meetings	
Total Transportation expenses	$
Union and professional dues	
Union Initiation fees/Union dues	
Professional organizations	
Total Union & professional dues	$
Work related publications	$
Uniform purchase, cleaning, repair	
Belt	
Coat	
Dress	
Dry cleaning	
Epaulets	
Jacket	
Hair clips	
Hat	
Laundry	
Maternity dress	
Nametags/Wings	
Pants	
Scarf/	
Serving garments	
Shirt	
Shoe repair	
Shoe shines	
Support hose	
Sweater	
Tie	
Uniform alterations/repair	
Vest	
Total uniform expense	$

Uniform Luggage	
Flight bag	
Garment bag	
Luggage repair	
Luggage tags	
Miscellaneous luggage items	
Suitcase	
Tote bag/Purse	
Wheels for luggage	
Total luggage purchase/repair	$
Bid service, Computer fees	
Bid service/trip trading fees	
ISP fees (prorated to business use)	
Layover Internet access fees	
Total bid service, computer fees	$
Work equipment, supplies	
Accessories used on layovers	
Alarm clock	
ATM/check cashing fees on layovers	
Batteries	
Business cards	
Cockpit keys/corkscrew/flashlight	
Cockpit supplies (maps etc)	
Computer supplies (toner, paper)	
Copying/fax/mailing costs	
Currency converter/Exchange fees	
Earpiece (pilots)	
FAA medical certificate	
Hair dryer/ Curling iron/Clothes iron	
ID replacement	
Loss of license insurance	
Manuals /Organizer	
Passport/Visa fees and photos	
Portable security dvc/smoke detector	
Sunglasses (pilots only)	
Upgrade training expenses	
Voltage converter	
Total work equipment, supplies	$

Business phone	
If you are on reserve, your monthly cell phone bill is deductible. If you are a schedule holder, deduct business related calls. Calls to scheduling, code-a-phone, voice response and calls to home area while on a trip are business related calls.	
Answering machine/service	
Business related phone calls	
Calling cards/Collect/Hotel phone calls	
Call waiting	
Cell phone purchase	
Monthly prorated cell fees (line holders)	
Monthly cell fees on reserve	
Pager purchase/usage fees	
Second telephone line	
Voicemail	
Total business phone	$
Training/Education/Job Hunting	
Books	
Course fees	
Dry cleaning/laundry in training	
Hotel	
Maintaining/additional ratings	
Other job-hunting fees/expenses	
Proficiency training/simulator time	
Resume printing/mailing	
Transportation/Parking	
Total job-hunting/Training	$
Training dates City	
Special/Temporary Assignment	
Commuting/Local transportation/Tips	
Dry cleaning/Laundry	
Housing/ Utilities/Phone	
Shipping/storage	
Total Temporary Assignment	$
Dates City	

Commuter Apartment Moving Expenses – If you transferred to a new base and incurred moving expenses, please list below:

The IRS defines your primary workplace as your tax home and does not allow a deduction for the cost of maintaining a commuter place. An exception to this is if you have a second job in the area of your residence. In those cases, the IRS allows a deduction for the cost of commuting from one job to another.

Old base		New base		Travel Expense	
Distance driven to transport belongings				Shipping Expense	
Date moved				Lodging expense during move	

W. K-12 Education Credits (For residents of AZ, IL, IA and MN)

AZ- Fees and donations to a public or charter school located in Arizona for extracurricular or character education programs. Expenses over $250.00 are carried over to the following year.

IL – Tuition, fees, book rental, band and lab equipment rental fees paid directly to private, public or religious schools.

IA – Tuition and textbook costs paid to an Iowa accredited not-for-profit school. Certain extracurricular program expenses qualify, such as activity fees, club dues, and school sports fees.

MN – Tuition and fees paid to private or public schools. Also costs of education supplies including up to $400 towards the purchase of a home computer and educational software.

Student's Name	Expenses	School Name	School Address

X. Foreign Domicile

Date foreign residence began		Date foreign residence ended	
Will foreign residence last at least 1 year?		Are you subject to tax in the base country?	Yes ❑ No❑
Country of citizenship		If yes, what type of tax?	
Did family members live abroad with you?		Type of work Visa you were issued	
Have you filed Form 2555 previously?	Yes❑ No❑	If yes, what year?	

If you kept a home in the United States while you were based outside of the U.S., please list dates, address and relationship of occupants:

If you were in the United States during the tax year (excluding work related purposes, such as layovers or training, please complete below:

Date arrived US	Date left US	Date arrived US	Date left US	Date arrived US	Date left US

State Specific Items

CA	Expenses associated with the purchase and installation of solar energy equipment	
CA	Renter's Credit – Check here ❑ if you paid rent on a California residence and are filing a California income tax return.	

CT Residents, please provide the following information for your state property tax credit (maximum $300 credit)

Property	CT Tax Town/District	Address or Year/Make/Model	Date Paid	Amount
Home				
Auto				
Auto				

DE	Clothing and expenses incurred for service as an active volunteer firefighter	
FL	A state Intangible tax return is required if you own securities valued at more than $250,000 ($500,000 if married filing jointly). Please include copies of your investment statements with your organizer.	
GA	Amount spent on home care services for persons over 62.	
HI	Cost of child restraint system	
HI	Renewable Energy Technologies Credit – include purchase information	
ID	Cost of insulation purchased last year and installed in primary residence.	
IL	Homeowners: please provide PIN (Property Index Number) from your property tax statement.	
IN	For installation installed in your primary residence, please list:	

Age of house		Purchase date		Installation date		Amount paid	

MA	Please provide Form 1099-HC. The information on this form is needed for the health care exemption and to avoid a tax penalty.	
MA	Qualified commuter expenses paid for public transportation (MBTA transit/rail, tolls paid through FastLane account)	
MI	Please provide the property tax statement showing the Taxable Value of Homestead, or enter the value here:	
MN	Please send us your Certificate of Rent Paid (renters) or Statement of Property Taxes Payable in 2016 (homeowners)	
MT	First Time Homebuyers Savings Account contributions	
TN	A state tax return is required if your taxable interest & dividend income is over $1,250 for the year ($2,500 if married filing jointly).	

All Clients Must Sign Below

We will prepare your federal income tax return and any state returns you may require from information you provide. In preparing your return(s), we will not audit or verify the data you submit although we may ask for clarification. We will use our professional judgment in resolving questions where the tax law is unclear or where there may be different interpretations of the law by authorities (e.g., tax agencies and courts). In the event a tax law ambiguity applies to your return, we will explain the possible alternative positions that may be taken on your return and will follow whatever position you request.

We will return to you any original documents that you provided us to prepare your return. Copies or facsimiles of documents that you submit to us will be disposed of in a secure manner.

Full payment of your tax preparation fee is required before we will electronically file your return or release the paper return to you.

Extension requests: We will automatically file extension requests, if needed, for tax organizers we receive prior to April 15. If we receive your organizer after April 2, we will make every effort to complete your return by April 15. Please contact us if you have not submitted a tax organizer, but need to file an extension request. Even if you file an extension request, the IRS and states will charge penalties and interest if you have paid less than 100% of your current tax liability by April 15.

This engagement letter will apply for all future years unless the agreement is terminated or amended in writing by you or us. We appreciate the opportunity to prepare your tax return.

______________________	__________	______________________	__________
Taxpayer Signature	Date	Spouse Signature	Date

Privacy Policy

The privacy of your client information has always been important to us, and we have always been bound by professional standards of confidentiality. We collect nonpublic personal information about you that is provided by you or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, tax organizers, worksheets and other documents necessary to provide professional services to you. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by you. We restrict access to nonpublic personal information about you to members of our firm who need to know that information in order to provide you professional services. We retain records relating to the professional services that we provide you in accordance with accounting and government standards. We employ physical, electronic, and procedural security safeguards to protect your nonpublic personal information.

Per Diem Calculations

Please include your trip information as listed below. This will help us maximize your deduction.

Alaska	**Flight Attendants**: Flight Crew Pay Sheets from Alaska's world website. Click on Departments/Work groups > Payroll Services > Flight Crew Pay Sheets > Pay Date. Please print in LANDSCAPE orientation. **Pilots**: Pilot Time Sheets from Alaska's world website. Please print in LANDSCAPE orientation.
American	**Flight Attendants:** Navigate to: JetNet > Flight Service > Tools & Links (in Options menu). Click the checkbox next to the year and click the 'get seq data' button to load your sequence history. Enter your email address and click the 'email' button. Forward the email that you receive to info@godiem.com and mention that you're a tax client. **Pilot** flight information is available on the APA website. Click on National Committees > More Committees > TASC > Pilot Services Bar > Previous Months Flying. Select the month and year, click on Retrieve Month and View all HSS.
ATA	Month end copy of your schedules, with city codes, for all months flown. To access your schedules on CCS, go to Schedules > Pay > Final Pay Register > Print Version.
Delta	Flight Attendants: In iCrew, under 'Schedules', select 'F/A Preference'. On the next page, click 'Schedule Leg Data Extract'. On the page that opens, select 'Yes' for the second option: 'email Schedule Leg Data to your company account." Click the 'OK' button. This will send a file to your Delta email account (it could take several minutes). Log into your Delta email account and forward the email that contains your Schedule Leg Data directly to: info@godiem.com. Mention that you're a tax client. Do not download the file to your computer before forwarding as it may lose some of its formatting. Pilots: In DeltaNet, select 'Admin' from the 'Pilot/Customer Engagement' menu. On the 'Admin' page, navigate to 'MyPAS'. Select the tax year and 'All' for the month. Click the 'Retrieve' button. Click the checkbox next to 'PayPeriod' to select all months. Click the 'Export' button. This will create a zip file that you can attch to an email and send to info@godiem.com. Mention in the email that you're a tax client, so we can match it with your tax file.
Federal Express	Trip pairings found in VIPS Trip Summaries. Please use the printable version.
Gemini	Crew Trac pairing printouts, or Crewmember Payroll Form (please add 3-letter city codes).
Hawaiian	Use to goBot app at www.godiem.com. Just follow the instructions for Hawaiian Airlines.
JetBlue	Monthly Flight Schedules
SkyWest	Use our goBot app to login into your company website and automatically download your flight information. Visit www.godiem.com and follow the instructions for SkyWest.
United s-UA	Copy of your year-end Meal Expense Report.
United s-CO	Use our goBot app (www.godiem.com) to automatically log in to your company website and transfer your flight information from your Pay Registers into our Per Diem Calculation database.
UPS	Flight Payroll Registers. Please use LANDSCAPE orientation when printing the pages.
Other airlines	Monthly reports of trips flown that your company provides you, logbook, or completed Per Diem Worksheet (download from www.mytaxcrew.com).

If you have questions or need help with your flight data,
call us at 949.234.0095 or email us at info@godiem.com

Pricing Information & Payment Method

All preparation fees must be paid prior to filing the return

Crew Package - Our Best Deal! Does not include state return. Includes 1040, Sched A (Itemized Deductions), Sched B (Interest & Dividends), Form 2106 (Unreimbursed Employee Expenses), AMT Calculation, and Per Diem Report.					$145
1040 without Per Diem Report. Does not include state return. Includes 1040, Schedule A and Schedule B.					$120
State return (price per state)		$20	Health Insurance Premium Tax Credit	8962	$20
Local return (for city/local returns)		$30	Household employee taxes	H	$30
Married couples (additional)		$20	Injured spouse/Innocent spouse	8379	$30
Additional tax on retirement income	5329	$20	Installment Gain	6252	$40
Alternative Minimum Tax (fee not applicable w/ crew pkg)	6251	$30	Investment interest expense	4952	$10
Alternative Motor Vehicle Credit	8910	$30	Investment tax for children under 18	8615	$30
Business use of home (included with Sched C)	8829	NC	Moving expenses	3903	$20
Cancelled Debt Exclusion from Income	982	$40	Non-deductible IRA	8606	$20
Charitable non-cash contributions over $500	8283	$25	Parents reporting child's income	8814	$30
Casualty Loss/Theft	4685	$30	Partnership/S-Corp/Estate (per schedule)	K-1	$25
Child care credit	2441	$20	Passive activity loss	8582	$25
Child Tax Credit	8812	NC	Rental Property (per property)	E	$30
Earned Income Credit	EIC	$20	Residential Energy Credit	5695	$25
Education credit/deduction	8863	$20	Sale of business assets	4797	$40
Extension of time to file	4868	NC	Sec 1256 Contracts and Straddles	6781	$20
Farm Income	F	$40	Self-employed/small business	C	$40
Foreign Bank Report FINCEN 114		$30	Complex Self-employed/small business	C	$70
Foreign earned income exclusion	2555	$50	Stock/bond sales (first 5) $2/each additional sale	D	$25
Foreign Financial Assets	8938	$30	Traditional IRA to Roth IRA rollover		$20
Health Coverage Exemptions	8965	$20	Paper filing copy of tax return		$20
Per Diem Report Only (by email) – no tax return		$45	Per Diem Report & Form 2106 Only (by email) – no tax return		$60
Per Diem Report Only (by US mail) – no tax return		$50	Per Diem Report & Form 2106 Only (by US mail) – no tax return		$65
Special handling for tax organizers postmarked after March 20 (or September 25 for Oct 17 extension)					$20
☐ **Go paperless!*** Check here to receive a digital copy of your return through SmartVault and **subtract $20** from your fee. You won't receive a paper copy of your return. This option requires your current email address.					**-$20**
				Total	

☐ **I have enclosed a check.** Make payable to Tax Crew. ($25 charge for returned checks)

☐ **Credit/Debit Card.** Bill my American Express, Visa, MasterCard or Discover Card

______________________________ Card Number   __________ Expiration Date   __________ Security Code

______________________________ Cardholder Name   ________________________ Signature

☐ **Online Payment.*** **Email me an invoice with a link for online payment once my return is finished. All fees must be paid before return is filed.**

This organizer covers the majority of tax related items. If you have any questions about anything not listed in the organizer, feel free to include additional sheets or notes. Or call or email us.