

**F** VALLEY OAK FINANCIAL, PLC  
**R** 4230 SOUTH WESTNEDGE, SUITE 6  
**O** KALAMAZOO, MI 49008  
**M** MLR@VOFCPA.COM 269-492-7220

## 2008 TAX ORGANIZER

**T**  
**O**

**This tax organizer has been prepared for your use in gathering the information needed for your 2008 tax return.**

**To save you time, selected information from your 2007 tax return has been entered within this organizer. Please line through any information which does not apply to your 2008 tax return.**

**In some cases, 2007 amounts have been included in a separate column. These amounts are for comparison purposes only. You do not need to change these prior year amounts.**

**If we may be of further assistance, please contact us at your convenience.**

269-492-7220

**REMOVE THIS SHEET PRIOR TO RETURNING THE COMPLETED ORGANIZER**

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I (We) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks, or other documents. This information is true, correct, and complete to the best of my (our) knowledge.

<b>Taxpayer Signature</b>	<b>Date</b>
<b>Spouse Signature</b>	<b>Date</b>

<b>Primary E-mail Address</b>	<b>Home Phone</b>	<b>Fax Number</b>
<b>Secondary E-mail Address</b>	<b>Taxpayer's Business Phone</b>	<b>Spouse's Business Phone</b>
<b>Preferred Method of Contact (i.e., cell phone, e-mail, etc.)</b>		

## ***2008 Valley Oak Financial - Client Address***

Dear Valued Client,

First and foremost, thank you. We really appreciate your continued business and hope that we are exceeding your service expectation delivery. If there is anything that we could do in addition to our existing relationship that may assist you in any way, please let us know so we may discuss it. Also, if you know anyone who could benefit from the services we provide, please do not hesitate to give them our contact information. We would appreciate the opportunity to be of service to them.

The year 2008 has brought us all many challenges and situations not seen before. We wanted to take this opportunity to communicate with you thoughts regarding the situation at hand. We feel our job is to keep you as informed as possible in an effort to take advantage of as many changes/opportunities that makes sense as they become available. A detailed list of a few of the hot topic items on the forefront is below. Please do not hesitate to contact us with any questions regarding the following information.

Economic downturns almost always mean difficult times. However, it allows us to revisit the basic principles of life to make sure we stay on track with our personal and financial goals. Credit has definitely tightened and become less available. "Cash is king" is a phrase that has become more important than ever, so getting and keeping cash should be high on the priority list. Thereby, making tax planning even more important. If anything related to the economic downturn is concerning you, please let us know so we can discuss it and determine if anything can be done to ease those concerns.

2009 Points of Interest:

- ***Required Stock Basis Reporting by Brokerage Firms – Begins in 2011.*** This is very important to prepare for now because in 2011, without instruction, brokerage firms will default to First-in, First-out (FIFO) unless you specify the shares of stock to be sold. Defaulting to FIFO can have a **SIGNIFICANT** tax impact on a sale of stock if the wrong basis is used for reporting. The IRS will begin to have the basis information in 2011, so correcting an error like this will be difficult and expensive. Preparing for this now, in an effort to change habits, could prove beneficial upon the 2011 implementation.
- ***IRS Audits:*** Will your supporting documentation stand up in an IRS audit? If you are unsure or do not know the answer to that question, a consultation regarding the matter would be wise. The benefits gained by this consultation will far outweigh its cost and will also provide significant piece of mind knowing you no longer have to worry about the repercussions of an audit. If you are unprepared and selected for an audit, it may cost your several thousand dollars in lost deductions resulting in additional taxes owed.

- **Required Minimum Distributions (RMDs):** Effective for 2009 only, the RMDs typically required for retirement accounts for those 70 ½ and older have been suspended. Please be aware and plan accordingly if necessary.
- **Michigan Unclaimed Property:** The following is a website for unclaimed property in Michigan. This is simply information we are providing to you as our client that we wanted to make you aware of. If desired, please check the website for any possible property to be claimed for you or your family. ([www.michigan.gov/unclaimedproperty](http://www.michigan.gov/unclaimedproperty))
- **New Tax Legislation:** In the past twelve months, congress has enacted nine significant pieces of tax legislation keeping the tax world complex. This is another reason to (1) complete the tax organizer questionnaire to the best of your ability so we are able to take advantage of all possibilities with such legislative changes and (2) communicate any unusual situations or circumstances you encountered financially in 2008 to make sure none of these opportunities are missed.

Again we thank you for your continued business. We look forward to seeing you during the 2009 filing season and wish you a Happy New Year!

Very Truly Yours,

Valley Oak Financial, PLC

A handwritten signature in black ink, appearing to read 'Matthew Rzepka', written in a cursive style.

Matthew L. Rzepka, CPA, CFP®

**2008 TAX QUESTIONNAIRE:**

**Completion of the engagement letter and tax questionnaire along with your signature (on the cover of this document) is required for the 2008 tax season. Please note that all forms represented in the immediate lists below are necessary for tax return completion. Thank you.**

Please provide the following tax support documents when delivering your tax information to us for preparation of your 2008 individual income tax return. Also, indicate the quantity of each form provided:

	#		#		#
W-2	_____	1099-R	_____	1099-B Brokerage Statements	_____
1099-INT	_____	1099-G	_____	1099 MISC	_____
1099-DIV	_____	1099-SSA	_____	1098 Mortg. Int.	_____
1098-T	_____	1099-LTC	_____	1099-C (Debt Cancellation)	_____
1099-Q (529)	_____	1099-A	_____	1099-S (Sale of RE)	_____
1041 K-1	_____	1065 K-1	_____	1120 S K-1	_____
1099-HAS/MSA	_____				

Please provide any additional tax documentation so we may accurately include all taxable events you may have incurred throughout the year. If you are uncertain, provide the information and we will determine the tax impact.

Please take a moment to complete the following questionnaire, so we may accurately report all necessary tax events for this tax year. Your signature is required on the cover page of this document.

**ELECTRONIC FILING NOTIFICATION**

Unless disqualified, we are required to file your returns electronically with the IRS and State. Please contact us with any questions.

**PERSONAL INFORMATION**

**YES**

**NO**

Did your marital status change during the year?

If married, do you and your spouse want to file or consider filing separate returns?

Did any of your contact information change during 2008?

If so, please provide new address, phone, cell phone or email:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you know if you or your spouse can be claimed as a dependent by another taxpayer?



**DEPENDENTS**

**YES**

**NO**

Were there any changes in dependents from the prior year?

If adding a dependent, please provide:

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Date of Birth \_\_\_\_\_

If removing a dependent, please identify \_\_\_\_\_

Did you pay for childcare while you worked or looked for work?

If so, please provide the provider's name, address, SS#/EIN# and 2008 amounts paid for each child.

\_\_\_\_\_  
 \_\_\_\_\_

Do you have any children under 24 and were a full time student with wages, interest or dividend income over \$900 or who sold any stock in 2008?

If yes, do you want us to prepare their return?

Did you adopt a child or begin adoption proceedings during 2008?

**PURCHASES, SALES & DEBTS**

Did you sell any securities, bonds or other investment property? If so, please attach a detailed schedule of the activity either self prepared or broker prepared.

(An example of what is needed for each transaction is below).

<u>Security</u>	<u># of Shares</u>	<u>Purchase Date</u>	<u>Sale Date</u>	<u>Sale Proceeds</u>	<u>Cost Basis</u>	<u>Gain (-Loss)</u>
Sample Inc	1,000	06/25/02	03/02/08	\$10,000	\$5,000	\$5,000

If you sold at a loss, did you buy back the identical security sold within 30 days before or after the sale? If yes, please explain on the notes page found at the end of the Questionnaire.

Did you have any debts canceled, forgiven or refinanced during 2008? (If yes, include 1099-C)

Did you purchase or sell a rental property or farm, or acquire or sell any interest in any partnership or S-Corporation during 2008? Please provide us with the K-1s as soon as they are available.

**PURCHASES, SALES & DEBTS** *(continued)*

**YES**

**NO**

Did you receive grants of stock options from your employer, exercise any stock options granted to you or dispose of any stock acquired under a qualified employee stock purchase plan? If so, please provide support (statements/schedules from your employer).



Did you engage in any put or call transactions? If yes, please provide details on the notes page found at the end of the Questionnaire.



**HOME/REAL ESTATE TRANSACTIONS**

Have you refinanced your mortgage or taken out a home equity loan this year? If yes, explain on the notes page found at the end of the Questionnaire.



Did you sell, exchange or purchase any real estate in 2008? If so, please attach the closing statements.



Did you sell your primary residence in 2008? If no, proceed to the next section.



If yes, did you own and occupy the home as your principal residence for at least two years out of the five-year period prior to the sale?



Did you ever rent this property?



Did you ever use any portion of the home for business purposes?



Have you or your spouse sold a principal residence within the last two years?



At the time of the sale, the residence was owned by the: Taxpayer  Spouse  Both

**IRA/PENSION DISTRIBUTIONS**

Did you withdraw any amounts from your Individual Retirement Account (IRA), Roth IRA, or pension plan? Indicate amount and provide all 1099Rs.



Total IRA withdrawal/distribution \_\_\_\_\_

Total Roth IRA withdrawal/distribution \_\_\_\_\_

Total pension withdrawal/distribution \_\_\_\_\_

If so, was it to acquire a principal residence or pay for qualified higher education expense?



Did you make a contribution to a retirement plan, 401k, SIMPLE, SEP, or IRA ***THAT IS NOT*** reported on your W-2 or K-1? If so, indicate amount and type of plan.



Taxpayer total contribution \_\_\_\_\_ Spouse total contribution \_\_\_\_\_

Did you retire or change jobs in 2008?

**IRA/PENSION DISTRIBUTIONS** *(continued)*

**YES**

**NO**

Did you receive retirement or severance compensation?



Did you or your spouse turn age 70½ during the year, and have money in an IRA or other retirement account without taking a distribution?



Have you taken your required minimum distribution?



**GIFTS**

Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, etc. with a total aggregate value in excess of \$12,000 to any individual during the year? If yes, please list in the space below or in the notes section at the end of this Questionnaire.



Did you assist in the purchase of any asset (auto, home, etc.) for any individual during the year?



Did you or your spouse make any gifts to a trust for any amount during the year?



Do you or your spouse have a life insurance trust?



Did you forgive any indebtedness to any individual, trust, or entity during the year? If yes, please explain.



**MISCELLANEOUS**

Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA?



Did you pay any student loan interest?



Did you or your dependents incur any post-secondary education expense, such as tuition? If yes, please provide 1099-T, if any.



Dependent's name \_\_\_\_\_ Tuition amount \_\_\_\_\_ School \_\_\_\_\_

Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (529 Plan)? If yes, include Form 1099-Q.



Did you move to a different home because of a change in the location of your job?



Did you have any household employees, whom you paid in excess of \$1,000 in any quarter, or \$1,500 for the entire year?



Did you file employment tax returns?

MISCELLANEOUS (continued)

YES

NO

Did you receive unreported tip income of \$20 or more in any month in 2008?

Did you or your spouse receive distributions from long-term care insurance contracts? If yes, include Form 1099-LTC.

Were you or your spouse a grantor or transferor for a foreign trust, or have an interest in, a signature or other authority over a bank account, securities account or other financial account in a foreign country? If yes, we must file Form TD F 90-22.1 Report of Foreign Bank and Financial Accounts (Failure to file can result in penalties ranging from \$25,000 to \$100,000.).

Did you create or transfer money or property to a foreign trust?

Did you purchase a new "hybrid" or alternate technology vehicle in 2008?

Did you use gasoline or special fuels for business or farm purposes (other than for a highway vehicle) during the year? If yes, how many gallons: \_\_\_\_\_

Have you received a punitive damage award or an award from damages other than for physical illness or injury?

Were you notified by the IRS or other taxing authority of any changes in prior years' returns?

Were any distributions from your IRA and/or Roth IRA distributed to a charitable organization?

If yes, please indicate the amount: \_\_\_\_\_

Did you donate to a qualifying Michigan charitable organization? If yes, please list the amounts.

Public Contributions: \_\_\_\_\_

Community Foundations: \_\_\_\_\_

Homeless Shelter/Food Banks: \_\_\_\_\_

Did you receive any payments from insurance companies, legal settlements, disability payments or other taxable income? Indicate amount: \_\_\_\_\_

Did you or your spouse have any transactions pertaining to a Health Savings Account (HSA) or Medical Savings Account (MSA) during 2008?

If you received a distribution from an HSA or MSA, please attach Form 1099-HSA/MSA.

If you contributed to an HSA/MSA, please indicate the amount: \_\_\_\_\_

With respect to any trust you have created or for which you are the trustee, have any beneficiaries passed away during 2008?

ECONOMIC STIMULUS PAYMENT

Did you receive this for 2007 in 2008?

If yes, please indicate the total amount received: \_\_\_\_\_

MISCELLANEOUS (continued)

YES

NO

Did you or your spouse make any contributions to a Qualified State Tuition Plan (Section 529 Plan) or a Coverdell Educational Savings Account during 2008?

If yes, enter the following:

Name of Designated Beneficiary	Social Security Number	State Sponsoring Plan	Account Number	2008 Amount Contributed

Did you engage in any bartering transactions?

Did you work outside the U.S. or pay any foreign taxes?

Have you been involved in a reportable transaction? These are transactions which produce questionable tax shelters, transactions which provide refunds of lost tax benefits, and/or require strict confidentiality of the transaction's tax benefits which result in significant amounts of losses with book to tax differences or provide tax credits with holding periods of less than 45 days. Tax avoidance transactions are included in this category.

LOCAL/CITY TAX RETURNS

Does your resident jurisdiction require a tax filing? If yes, please provide jurisdiction name.

Jurisdiction name \_\_\_\_\_

It is the taxpayer's responsibility to inform us if a local/city tax return is required within their resident jurisdiction. Please provide the local forms whenever possible.

FEDERAL, STATE & CITY TAX PAYMENTS

Refund Application: If you have an overpayment of 2008 taxes, do you want the excess:

▪ Applied to your 2009 estimated tax liability

▪ Refunded via a check in the mail

▪ Refunded via direct deposit (attach voided check)

TAPE VOIDED CHECK HERE

**FEDERAL, STATE & LOCAL ESTIMATED TAX PAYMENTS**

2008 1<sup>st</sup> Qtr. ES due 04-15-2008  
 2008 2<sup>nd</sup> Qtr. ES due 06-16-2008  
 2008 3<sup>rd</sup> Qtr. ES due 09-15-2008  
 2008 4<sup>th</sup> Qtr. ES due 01-15-2009

Date Paid	FED Amount	State Amount	Local Amount

**YES**      **NO**

With your authorization, the IRS and certain states allow us to verify credits, payments, etc. for your tax account online. Do we have your authorization to view this information if necessary?

    

Do you expect your 2009 taxable income and withholding to be generally the same as 2008? If no, please provide details on the notes page found at the end of the Questionnaire.

    

**ASSET PROTECTION AND PLANNING**

Do you have a financial advisor, attorney, banker, or other professional that would be used in your planning process that we should know about?

    

If yes, and we are not aware of who it is, please provide their name and number for our records.

Name \_\_\_\_\_ Number \_\_\_\_\_ Email \_\_\_\_\_  
 Name \_\_\_\_\_ Number \_\_\_\_\_ Email \_\_\_\_\_  
 Name \_\_\_\_\_ Number \_\_\_\_\_ Email \_\_\_\_\_  
 Name \_\_\_\_\_ Number \_\_\_\_\_ Email \_\_\_\_\_

Do you have an estate plan?

    

Would you like more information on estate planning?

    

Are you currently making or considering cash gifts to children or grandchildren?

    

If yes, has anyone ever explained leveraged gifting to children and grandchildren?

    

Are you interested in a current analysis for a Roth IRA conversion available in 2010?

    

Would you like to increase the amount of tax-free income available to you in retirement?

    

Do you understand estate taxes and whether or not you should be worried about having estate taxes due upon your death?

    

Do you have a retirement distribution strategy?

    

Is enough of your retirement income guaranteed never to run out no matter how long you live?

    

Are you currently receiving required minimum distributions from your retirement account(s) and are not in need of the income but because of IRS rules, you have to take the money out?

**ASSET PROTECTION AND PLANNING** *(continued)*

**YES**

**NO**

Do you think your family would be financially stable if one spouse unexpectedly passed away?  
Do both spouses (if applicable) earn an income?

Do you feel comfortable with your current level of life insurance?

Would you like to learn about the benefits of providing life insurance for children?  
(One of those benefits can guarantee their future insurability using life insurance.)

Do you think an IRA is a good asset to pass on to your children through inheritance?

Are you interested in a planning document that details all aspects of your finances and wishes should you unexpectedly pass away?

Are the beneficiaries on your retirement accounts and insurance policies up to date?

Would you like a complimentary financial organizer packet?

**Thank you for your continued business this tax season. Some of the aforementioned questions may require the involvement of other advisors on your team. We will not hesitate to involve all of your advisors in your planning process related to any of these issues. We at Valley Oak Financial feel you will be best served by an informed team approach to your financial well-being.**

**In relation to the asset protection and planning questions, someone may be contacting you based on your answers (a Valley Oak representative or your current advisor as prompted by us) to discuss these items. If you would not like to be contacted; simply check the box below. Valley Oak will not be charging any fees for initiating this contact and will also assure the same if we prompt other advisors to contact you. If fees from other advisors are possible, a Valley Oak representative will contact you first so you have the option of proceeding knowing there could be fees involved.**

Please **DO NOT** have anyone contact me regarding the above information.





Personal Information, Dependent(s) and Wages

Taxpayer: First Name and Initial, Last Name, Social Security Number, Occupation, Date of Birth, Daytime/Work Telephone Number, Evening/Home Telephone Number, Primary Email Address, Secondary Email Address

Spouse: First Name and Initial, Last Name, Social Security Number, Occupation, Date of Birth

Present Mailing Address: Street Address, Apartment Number, City, State, ZIP code, Foreign Country

May the IRS or other taxing authority discuss the return with the preparer? Is the taxpayer claimed as a dependent on someone else's tax return? Are you considered legally blind per IRS regulations? Do you want to contribute to the Presidential Election Campaign Fund? Stimulus payment received before any reductions (If not received, enter -0-)

Dependent Information: Table with columns: First Name and Initial, Last Name, Social Security Number, Date of Birth (Mo/Da/Yr), Relationship to Taxpayer, Months Lived in Your Home, X if Disabled, Yes or No

Please provide the name of any person living with you who is claimed as a dependent on someone else's tax return. Please list the years for which a release of claim to exemption is given for a dependent child not living with you

Wages and Salaries: Please enclose all copies of your current year Forms W-2

Table with columns: TS, Employer's Name, Taxable Wages, Tax Withheld (Federal, FICA/TIER 1, Medicare, State, Local)



**Interest Income**

**5A**

**Interest Information:**

Please enclose copies of all Forms 1099-INT or other documents relating to interest received

TSJ	Name of Payer	Savings & Loans, Bank and Other	U.S. Bonds and Obligations	Tax-Exempt Interest	2007 Interest Amount
<b>Total</b>					

**Seller-Financed Mortgage Interest Information:**

Name of Individual to Whom Mortgage Interest Was Paid	Identification Number of Individual	2008 Interest Amount	2007 Interest Amount

Address of Individual to Whom Mortgage Interest Was Paid

**Enter Any Additional Information:**

**Note: Please list all items sold during the year on Form 7.**





## Miscellaneous Income, Adjustments and Alimony

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Please enclose Forms: W-2G, 1099-MISC, 1099-RRB, 1099-SSA, 1099-SA, 1099-LTC, 1099-G and 1098-E

**Miscellaneous Income and Adjustments:**

	TSJ _____		TSJ _____	
	2008 Amount	2007 Amount	2008 Amount	2007 Amount
Taxable pensions and annuities received .....				
Nontaxable pensions and annuities received .....				
Federal withholding on pensions and annuities .....				
State withholding on pensions and annuities .....				
Unemployment compensation received .....				
Unemployment compensation repaid in 2008 .....				
Social security benefits received .....				
Social security benefits repaid in 2008 .....				
Medicare premiums withheld .....				
Tier 1 railroad retirement benefits received .....				
Tier 1 railroad retirement benefits repaid in 2008 .....				
Taxable IRA distributions .....				
Nontaxable IRA distributions .....				
Total lump sum social security received .....				
Lump sum taxable social security .....				
Other federal withholding .....				
Other state withholding .....				

**State and Local Income Tax Refunds:**

TSJ	State	City	Tax Year	Income Tax Refund	
				State	Local

**Educator Expenses:** (Deduction for amounts paid by educators of kindergarten through Grade 12)

TS	2008 Amount	2007 Amount

**Other Income:**

TSJ	Nature and Source	2008 Amount	2007 Amount

**Other Adjustments to Income:** (Please enclose all Forms 1098-E for Student Loan Interest Paid)

TSJ	Nature and Source	2008 Amount	2007 Amount

**Alimony Paid or Received:**

TSJ	Recipient's Name	Recipient's Social Security No.	Alimony Received?	2008 Amount	2007 Amount





**Itemized Deductions - Mortgage Interest and Points**

**Mortgage Questions for 2008:**

	<input type="checkbox"/> <b>Yes</b>	<input type="checkbox"/> <b>No</b>
If you purchased or sold your home, did you include any mortgage interest from your closing statement in the amount below? . . .	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance your home? (If Yes, please enclose the closing statement.) . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, how many years is your new mortgage loan? . . . . . _____		
Did you purchase a new home or sell your former home during the year? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
If Yes, please enclose the closing statements from the purchase and sale of your new and former homes.		
If Yes, also, did you have an ownership interest in a principal residence in the US during the 3 year period prior to the purchase of this home? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>

**Home Mortgage Interest Paid To Financial Institutions:**

TSJ	Paid To	Did You Receive Form 1098?		2008 Amount	2007 Amount
		Yes	No		

**Other Home Mortgage Interest Paid:**

TSJ	Paid To		ID Number	2008 Amount	2007 Amount
	Name	Address			

**Deductible Points:**

TSJ	Paid To	Did You Receive Form 1098?		2008 Amount	2007 Amount
		Yes	No		

**Mortgage Insurance Premiums:**

Premiums paid or accrued for qualified mortgage insurance.

TSJ	2008 Amount	2007 Amount

**Investment Interest Expense:**

Interest paid on money you borrowed that is allocable to property held for investment.

TSJ	Paid To	2008 Amount	2007 Amount



**Itemized Deductions - Contributions**

**Cash Contributions:**

You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution. Clothes and household items donated must be in good, used condition or better in order to be deductible unless the item donated is worth more than \$500 and you have the item's value appraised. Attach a copy of the appraisal. Include any vehicles donated to charity. Attach Forms 1098-C received from the charity.

TSJ	Organization or Description of Contribution	2008 Amount	2007 Amount

TSJ	Conservation Real Property	2008 Amount	2007 Amount
	100% limit		
	50% limit		

TSJ	Description	2008 Miles	2007 Miles
	Number of miles traveled performing volunteer work for qualified charitable organizations		
	Number of miles traveled performing volunteer work for qualified charitable organizations for Midwest disaster relief work before July 1, 2008		
	Number of miles traveled performing volunteer work for qualified charitable organizations for Midwest disaster relief work after June 30, 2008		

TSJ	Description	2008 Amount
	Cash contributions made on or after May 2, 2008, in support of Midwestern disaster area relief efforts	

**Noncash Contributions Totaling Less Than or Equal to \$500:**

TSJ	Description of Donated Property	2008 Amount	2007 Amount

**Noncash Contributions Totaling More Than \$500:**

TSJ \_\_\_\_\_  
 Description of the donated property \_\_\_\_\_

Donee organization name \_\_\_\_\_

Donee organization address \_\_\_\_\_

Date the property was acquired by the taxpayer (Mo/Da/Yr) \_\_\_\_\_

Date the property was donated (Mo/Da/Yr) \_\_\_\_\_

Cost or basis of the donated property

Fair market value of the donated property

Which of the following methods was used to determine the fair market value? CAUTION: Generally, contributions in excess of \$5,000 of similar property will require an appraisal (does not apply to marketable securities)

- Appraisal       Thrift shop value       Catalog       Comparable sale

Other - please explain \_\_\_\_\_

Which of the following describes how this donated property was acquired?

- Purchase       Gift       Inheritance       Exchange