Client Name ____________________ Client # __________

2009	1040	US	Stimulus Payment / Miscellaneous Information / Direct Deposit	3

ECONOMIC STIMULUS PAYMENTS			TS	ST	Src
Memo amount	83				
Actual amount received (-1 if none)	84				
2007 filing status (table 4)	85				
Nontaxable veterans disability or death benefits	87				
1=taxpayer or spouse was member of military during 2009	86				
1=have IRS figure rebate credit	89				
Recovery rebate credit [O]	92				
MISCELLANEOUS					
Presidential campaign: 1=self, 2=spouse, 3=both, 4=neither, 5=blank [O]	1				
Designee/ IRS Discussion — Allow discussion: 1=yes, 2=no, 3=blank [O]	17				
Designee/ IRS Discussion — Designee's name [O]	61	(28)			
Designee/ IRS Discussion — Designee's phone number [O]	62	(14)			
Designee/ IRS Discussion — Designee's PIN (5 digit numeric) [O]	63	(5)			
Personal Representative — Name	77	(40)			
Personal Representative — Address	78	(40)			
1040 label: 1=IRS format, 2=standard (address chg) [O]	2				
Text style: 1=mixed case, 2=upper case [O]	3				
Daytime phone: 1=print, 2=print (suppress wen opt.), 3=suppress [O]	26				
Email address: 1=print, 2=print (suppress wen opt.), 3=suppress [O]	52				
Tax filing envelope: 1=6 x 9, 2=9½ x 11½ [O]	27				
Form 1040A: 1=when applicable, 2=suppress [O]	4				
Form 1040EZ: 1=when applicable, 2=suppress [O]	5				
Form 1040NR-EZ: 1=when applicable, 2=suppress [O]	25				
Form 1040-V: 1=when applicable, 2=suppress [O]	6				
Form 1040 payment (defaults to amount due) [O]	7				
Wage schedule: 1=with tax return, 2=with worksheets, 3=suppress [O]	8				
Basis schedule (table 1) [O]	64				
State K-1 reconciliation worksheets (1=when applicable, 2=suppress) [O]	90				
Schedule of loss limitations (table 1) [O]	65				
Effective tax rate: 1=when applicable, 2=suppress [O]	33				
1=debtor in Chapter 11 bankruptcy case filed after October 16, 2006	70				
1=MFS spouse exemption	10				
1=suppress spouse exemption on MFJ return	12				
HOH Spouse Exemption — First name of spouse	56	(20)			
HOH Spouse Exemption — Last name of spouse	57	(20)			
HOH Spouse Exemption — Social security number	58	(11)			
Form 1040 text	76	(40)			
1=filed pursuant to Section 1.911-7(a)(2)(i)(D)	75				
1=converted client (proforma use only)	14				
ORGANIZER MISCELLANEOUS					
1=suppress next year's client organizer	13				
Client organizer type (table 3)	387				
Tax return appointment date (m/d/y) [O]	1064				
Tax return appointment time [O]	1065	(10)			
Tax return appointment location [O]	1066	(30)			

1 **Basis/Loss Limit Schedules**

1 = S-corp losses with tax return
2 = with tax return
3 = with worksheets
4 = suppress

2 **ES Electronic Payment Date**

1 = April 15, 2010
2 = June 16, 2010
3 = September 15, 2010

3 **Client Organizer Type**

1 = Complete paper organizer
2 = Condensed paper organizer
3 = Partial paper organizer
4 = Blank paper organizer
5 = Complete e-Organizer
6 = Partial e-Organizer

4 **2007 Filing Status**

1 = Single
2 = Married filing joint
3 = Married filing separate
4 = Head of household
5 = Qualifying widow(er)

	Hash Total (do not include date amounts)		3

Client Name ______________________ Client # ________

2009	1040	US	Make Work Pay Credit / Miscellaneous Information / Direct Deposit (cont.)	3 p2

DIRECT DEPOSIT OF REFUND / ELECTRONIC PAYMENT					TS	ST	Src	
1=direct deposit of refund			18					
1=force federal direct deposit bank information to print			81					
Electronic Filing Only	Main Form	1=electronic payment of balance due	34					
		Electronic payment (m/d/y) [O]	35					
	2009 estimated tax: 1=electronic payment of estimated tax		36					
	Extensions	1=electronic pmt of tax due with first ext.	42					
		First extension payment date (m/d/y) [O]	43					
Financial Institution #1	1=foreign financial institution transaction (IAT)		653					
	Name of financial institution (memo only)		19					(30)
	Percentage of refund to apply to this account (xx.xx)		24					
	Amount of refund to apply to this account [O]		41					
	Routing Transit Number		20					(9)
	Depositor Account Number		21					(17)
	Type of account (table 1)		22					
	Type of investment (table 2)		71					
SPLIT REFUND (8888)								
Financial Institution #2	1=foreign financial institution transaction (IAT)		654					
	Name of financial institution (memo only)		44					(30)
	Percentage of refund to apply to this account (xx.xx)		45					
	Amount of refund to apply to this account [O]		46					
	Routing Transit Number		47					(9)
	Depositor Account Number		48					(17)
	Type of account (table 1)		49					
	Type of investment (table 2)		72					
Financial Institution #3	1=foreign financial institution transaction (IAT)		655					
	Name of financial institution (memo only)		50					(30)
	Percentage of refund to apply to this account (xx.xx)		51					
	Amount of refund to apply to this account [O]		60					
	Routing Transit Number		67					(9)
	Depositor Account Number		68					(17)
	Type of account (table 1)		69					
	Type of investment (table 2)		73					

1 Type of Account

1 = Savings
2 = Checking

2 Type of Investment

1 = Checking or Savings (default)
2 = Taxpayer's IRA (next year limits)
3 = Spouse's IRA (next year limits)
4 = Health Savings Account (HSA)
5 = Archer MSA
6 = Coverdell Savings Account (ESA)
7 = Other
8 = Taxpayer's IRA (current year limits)
9 = Spouse's IRA (current year limits)
10 = Series | Treasury Bonds

	Hash Total (do not include date amounts		3 p2