

E-organizer Instructions

Prior to your tax appointment, you will receive a secure email with the 2019 Tax Organizer attached. The email will have the following information:

- From: Tax Organizer Administrator.
- Subject: Lexington Financial: 2019 Tax E-Organizer.

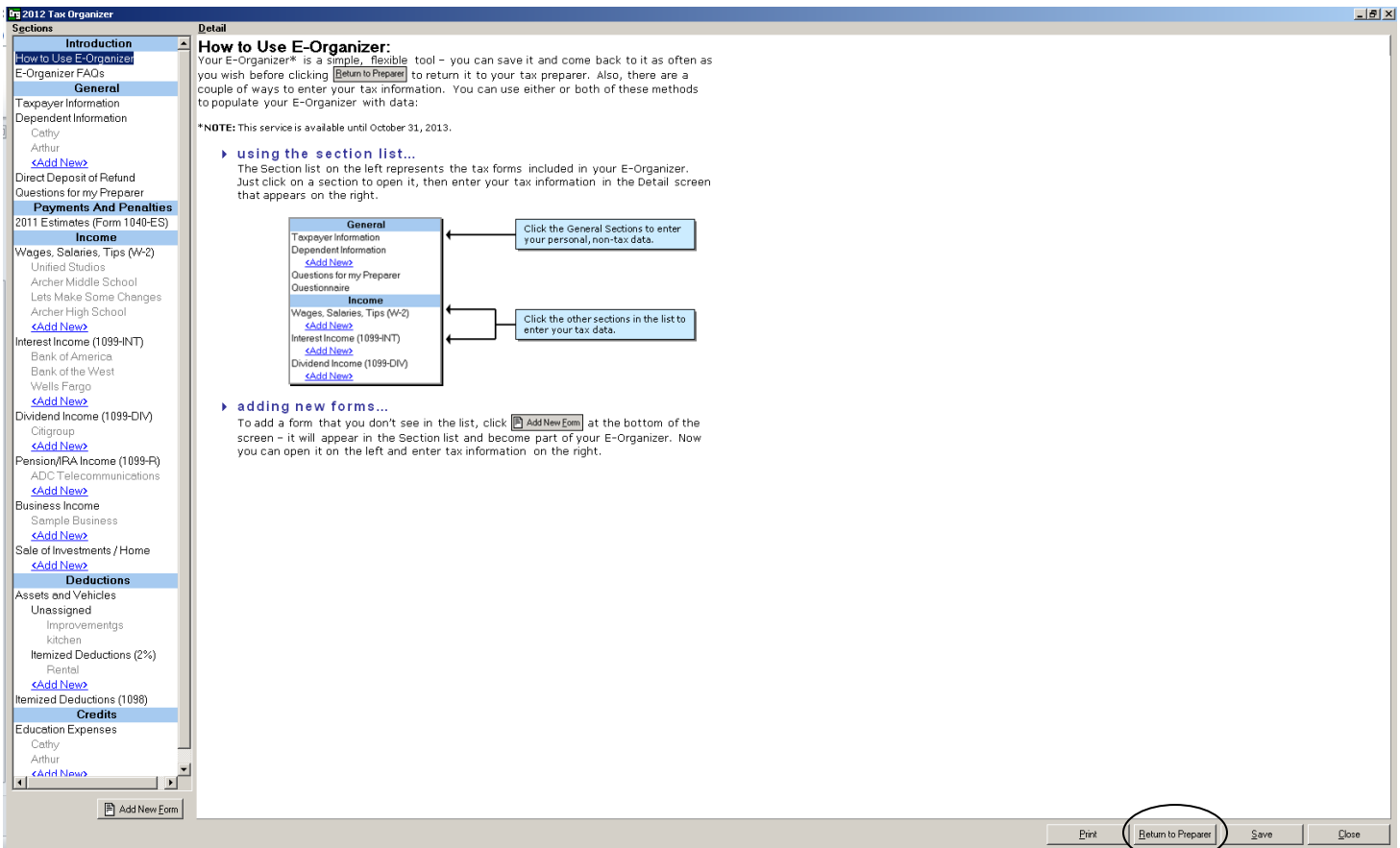
Open the email. Follow the instructions in the email on how to download your e-organizer to your computer. In the body of the email will be a website link from which you will download the organizer. Click on the link to retrieve your e-organizer then click the “Save” button to save it to your computer. Be sure to *remember* where you saved it on your hard drive.

Next, go to where you saved it on your computer. The name of the e-organizer file that you downloaded is EOrg2019.exe. Double click the file to open the organizer and enter your password. **Your password is your zip code + the last four digits of your Social Security number.** Click the “Continue” button.

A screen similar to the one below will be displayed with instructions on how to use, edit, update, and add new information into the e-organizer. Be sure to click the “Save” button to save any changes. If you have any questions, please don’t hesitate to call us (phone 408-395-5000).

To return the completed e-organizer to Lexington Financial:

1. Click the “Return to Preparer” button.
2. On the next window, click the “Yes” button to save all changes and updates.
3. On the next screen, make sure the option “E-mail to Lexington Financial (eorg@lexington-finance.com)” is checked. Click the “Send” button.



2012 Tax Organizer

Sections

- Introduction
 - How to Use E-Organizer
 - E-Organizer FAQs
- General
 - Taxpayer Information
 - Dependent Information
 - Cathy
 - Arthur
 - [Add New](#)
 - Direct Deposit of Refund
 - Questions for my Preparer
- Payments And Penalties
 - 2011 Estimates (Form 1040-ES)
- Income
 - Wages, Salaries, Tips (W-2)
 - Unified Studios
 - Archer Middle School
 - Lets Make Some Changes
 - Archer High School
 - [Add New](#)
 - Interest Income (1099-INT)
 - Bank of America
 - Bank of the West
 - Wells Fargo
 - [Add New](#)
 - Dividend Income (1099-DIV)
 - Citigroup
 - [Add New](#)
 - Pension/IRA Income (1099-R)
 - ADC Telecommunications
 - [Add New](#)
- Business Income
 - Sample Business
 - [Add New](#)
- Sale of Investments / Home
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- Deductions
 - Assets and Vehicles
 - Unassigned
 - Improvements
 - Kitchen
 - Itemized Deductions (2%)
 - Rental
 - [Add New](#)
 - Itemized Deductions (1098)
 - Credits
 - Education Expenses
 - Cathy
 - Arthur
 - [Add New](#)

Detail

How to Use E-Organizer:
Your E-Organizer* is a simple, flexible tool – you can save it and come back to it as often as you wish before clicking [Return to Preparer](#) to return it to your tax preparer. Also, there are a couple of ways to enter your tax information. You can use either or both of these methods to populate your E-Organizer with data:

*NOTE: This service is available until October 31, 2013.

▶ **using the section list...**
The Section list on the left represents the tax forms included in your E-Organizer. Just click on a section to open it, then enter your tax information in the Detail screen that appears on the right.

▶ **adding new forms...**
To add a form that you don't see in the list, click [Add New Form](#) at the bottom of the screen – it will appear in the Section list and become part of your E-Organizer. Now you can open it on the left and enter tax information on the right.

Diagram illustrating the flow of information:

- Click the General Sections to enter your personal, non-tax data. (Points to Taxpayer Information, Dependent Information, Questions for my Preparer, Questionnaire)
- Click the other sections in the list to enter your tax data. (Points to Wages, Salaries, Tips (W-2), Interest Income (1099-INT), Dividend Income (1099-DIV))

Buttons at the bottom: Print, **Return to Preparer**, Save, Close