

Pro★Star, LLC
CLIENT TAX ORGANIZER

We have prepared this organizer to assist you in preparation of your federal and state income tax returns. If you wish to have *Pro★Star* arrange to have your returns prepared, we have negotiated preferred rates for you through our strategic alliance with Zearth Advisors & Co., Inc. These rates are posted on our website at www.prostaronline.com. **In order to take advantage of these preferred rates, you must complete this organizer in full and return it with copies of last year's tax returns and all supporting documentation for last year including W-2 and 1099 forms by no later than **March 15**.** Please attach additional sheets where necessary.

NAME _____

ADDRESS _____

CITY, STATE _____ COUNTY: _____

ZIP CODE _____
 (* If address changed during the last year, please list old address and date of change)

TELEPHONE _____

FAX _____

EMAIL _____

PERSONAL INFORMATION

	PLAYER	SPOUSE
NAME		
BIRTH DATE		
SOCIAL SECURITY #		
OCCUPATION	Professional Athlete	

DEPENDENT INFORMATION

Full Name	Birth Date	Social Security # (Required)	Relationship	# Mos. Lived in your home	Blank =child at home; 1=child not home; 2=other dependant

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THE YEAR IN REVIEW: Preliminary Questions

YES NO

Were there any births, adoptions, marriages, divorces or deaths in your immediate family during the year?

Are any of your unmarried children who might be claimed as a dependent 19 years of age or older?

Do you have children under age 14 with interest and dividend income in excess of \$500, or total investment income in excess of \$1,100?

Can you be claimed as a dependent on another person's tax return?

Did you or your spouse receive any distribution from a profit-sharing plan, retirement plan, or individual retirement account (IRA)? If YES, amount: \$_____

Did you or your spouse rollover a profit-sharing or retirement plan distribution to another plan? If YES, enter amount \$_____ and attach Form 1099-R

Did you or your spouse receive any disability income during the year?

If YES, enter amount: \$_____

Did you purchase, sell or refinance your principal home or your second home or make a home equity loan during the year? If YES, please send all escrow papers and other relevant information with this completed form.

Did you purchase any business assets or convert any assets to business use? If YES, please be sure to complete the Asset Acquisition portion of this organizer and provide any documentation with this completed organizer.

Did you dispose of any business assets? If YES, please complete the Asset Disposition portion of this organizer and attach any documentation.

Did you sell any stocks, bonds or other investment property during the year? If YES, please be sure to complete the Capital Gains & Losses portion of this organizer and provide any settlement documentation you have with this completed organizer.

Did you use your car on the job other than to get to and from work?

Does anyone owe you money which has become uncollectible?

Did you incur any moving expenses during the year due to a change in employment?

Did you or your spouse work out of town (away from your home) during part of the year?

Did you incur a loss because of damaged or stolen property during the year?

Did you cash in any Series EE U.S. Savings Bonds issued after 1989?

Do you want to allocate \$1 to the Presidential Election Campaign Fund?

Does your spouse want to allocate \$1 to the Presidential Election Campaign Fund?

Did you have an interest in or signature over a bank or brokerage account in a foreign country, or were you a grantor of or trustor to a foreign trust?

Were you audited by either the Internal Revenue Service or any State taxing agency during the year?

Please list each and every STATE in which you played an AWAY game during last year's NFL regular season, and the number of times in each state. Please indicate if you were INACTIVE for any away game by the notation (IA). (CFL Clients, list each away province)

- 1. _____ 5. _____
2. _____ 6. _____
3. _____ 7. _____
4. _____ 8. _____

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INCOME INFORMATION: WAGES, SALARIES, TIPS, ETC.

(See W-2, 1099, etc.)

EMPLOYER 1	PLAYER	SPOUSE
Employer Name		
Wages & Salaries		
Federal Withholding		
Social Security Tax		
Medicare Tax		
State Withholding		
Local Withholding		
EMPLOYER 2	PLAYER	SPOUSE
Employer Name		
Wages & Salaries		
Federal Withholding		
Social Security Tax		
Medicare Tax		
State Withholding		
Local Withholding		
EMPLOYER 3	PLAYER	SPOUSE
Employer Name		
Wages & Salaries		
Federal Withholding		
Social Security Tax		
Medicare Tax		
State Withholding		
Local Withholding		

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INCOME INFORMATION: OTHER INCOME

Interest from Banks		
Bank Name	PLAYER	SPOUSE
1.		
2.		
3.		
4.		
Tax Exempt Interest: Bonds, T-Bills, Etc.		
1.		
2.		
3.		
4.		
Other Items		
Last Year's State Tax Refund Amount(s)		
Last Year's Federal Tax Refund Amount		
Alimony Received		
Unemployment Comp		
Taxable Scholarships		
Lottery Winnings		
Gambling Winnings		
NFLPA Dues Rebate		
Players, Inc. Marketing Income		
Other Marketing & Endorsement Income		

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DIVIDEND INCOME (list each separately)

Payor	Gross Div	Cap Gains Div	Nontaxable Div	Federal Nontaxable	State Nontaxable

ADJUSTMENTS TO INCOME

	PLAYER	SPOUSE
Alimony Paid		
IRA Early Withdrawal		
Other		

IRA & 401(k) CONTRIBUTIONS

	PLAYER	SPOUSE
Were you a participant in an employer pension (401k), profit sharing, or stock bonus plan?	Yes No	Yes No
Would you like to contribute the maximum IRA amount that can be deducted?	Yes No	Yes No
How much did you contribute to your IRA/401k last year?		
Enter the amount you contributed for a non-working spouse		

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ITEMIZED DEDUCTIONS

(note that not all items listed below qualify as deductible expenses. Deductibility is based on and subject to IRS rules and regulations.)

	PLAYER	SPOUSE
NFLPA Dues		
Agent Fees		
Accountant/CPA Fees		
Tax Preparer Fees		
Health Supplements		
Massages/Manipulations		
Insurance Premiums		
Training Equipment/Supplies		
State Taxes Paid		
Local Taxes Paid		
Real Estate Taxes Paid		
Auto License Fees		
Personal Property Taxes Paid		
Foreign Income Taxes Paid		
Home Mortgage Interest Paid		
Points Paid on Home Loan		
Volunteer Expenses & Travel		
Gambling Losses		
Charitable Contributions		
UNREIMBURSED EMPLOYEE EXPENSES		
Meals & Entertainment Expenses		
Local Transportation		
Travel Away from Home Overnight		
Medicine, Doctors, Dentists, etc.		
Investment Expense		
Safe Deposit Box Rental		
Other:		

