1475 S Bascom Ave Suite 201 Campbell, CA 95008 Phone: 408.395.5000 Fax: 512.688.5223 nancy@lexington-finance.com

503 Woodland Park Georgetown, TX 78633 Phone: 512.688.5222

LEXINGTON

E-organizer Instructions

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

- From: Tax Organizer Administrator.
- Subject: Lexington Financial: 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 <u>EOrg2022.exe</u>. 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 "<u>E-mail to Lexington Financial</u> (eorg@lexington-finance.com)" is checked. Click the "**Send**" button.

ng 2012 Tax Organizer					_ 8 ×
Sections	Detail				
Introduction A	How to Use E-Organizer:				
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				
E-Organizer FAQs	you wish before clicking Betun to Prepare to return it to your tax preparer. Also, there are a				
General	couple of ways to enter your tax information. You can use either or both of these methods				
Taxpaver Information	to populate your E-Organizer with data:				
 Dependent Information 					
Cathy	*NOTE: This service is available until October 31, 2013.				
Arthur					
cAdd New2	▶ using the section list				
Direct Deposit of Befund	The Section list on the left represents the tax forms included in your E-Organizer.				
Questions for my Preparer	Just click on a section to open it, then enter your tax information in the betail screen				
Payments And Penalties	that appears on the right.				
2011 Estimates (Form 1040-ES)	Concert				
Income	Tavpe at long time Click the General Sections to enter				
Wages Salaries Tips (W-2)	Dependent Information				
Unified Studios	sAdd News				
Archer Middle School	Questions for my Preparer				
Lets Make Some Changes	Questionnaire				
Archer High School					
Add News	Click the other sections in the list to				
laterast income (1099 INIT)	Interest Income (1099-INT)				
Real of America	sôdd Nevo				
Bank of America	Dividend Income (1099-DIV)				
Walls Easts	seddhiawe				
Weis Pargo					
Dividend Income (1099-DIVA	▶ adding new forms				
Citizza una	To add a form that you don't see in the list, click 🖹 Add New Form at the bottom of the				
child Novo	screen – it will appear in the Section list and become part of your E-Organizer. Now				
Papaian (RA Income (1099-P)	you can open it on the left and enter tax information on the right.				
ADC Tologommunications					
ADC TRIECOMMUNICATIONS					
Dusing a lagger					
Dusiness income					
Sample Dusiness					
CAUCINEWS					
Sale of investments / nome					
<u>CAUGINEWZ</u>					
Deductions					
Assets and vehicles					
Unassigned					
linprovementgs					
Kitchen Hawing d Darkustians (0%)					
Remized Deductions (2%)					
Hental					
CAdd News					
nemized Deductions (1098)					
Credits					
Education Expenses					
Lathy					
Annur					
A CANONANA A					
Add New Form					
		0.11		c (a
		Ennt	Heturn to Preparer	≥ave	Liose