

E-organizer Instructions

Prior to your tax appointment, you will receive a secure email with the Tax Organizer attached. The email will 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 EOrg2022.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
- E-Organizer FAQs
- General
- Taxpayer Information
- Dependent Information
- Direct Deposit of Refund
- Questions for my Preparer
- Payments And Penalties
- 2011 Estimates (Form 1040-ES)
- Income
- Wages, Salaries, Tips (W-2)
- Interest Income (1099-INT)
- Dividend Income (1099-DIV)
- Pension/IRA Income (1099-R)
- Business Income
- Sale of Investments / Home
- Deductions
- Assets and Vehicles
- Credits

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.

Click the General Sections to enter your personal, non-tax data.

Click the other sections in the list to enter your tax data.

Print Return to Preparer Save Close