

Filling In Your 2011 Tax Organizer

- Open the Organizer document
- On the upper right-hand side, click the Tools tab
- Click the Content tab
- Click on Add or Edit Text Box (see red circle)
 - At this point you can click wherever you need to type
 - If you need to, you can change the font size using the floating Typewriter box (see purple circle)
- When finished Save the document and send it to BHB Advisors.

Acrobat Instructions for Organizer.pdf - Adobe Acrobat

File Edit View Window Help

Create [Icons]

7 (1 of 1) [Icons] 105%

Tools Comment Share

Pages

Content

Add Bookmark

Attach a File

Edit Text & Objects

Edit Document Text

Add or Edit Text Box

Add or Edit Interactive Object

Link

OK Button

Select Object

Forms

Recognize Text

Protection

Sign & Certify

Typewriter

10

Change font size

Personal Information 3

Taxpayer: trial version On File
First Name and Initial Last Name Social Security Number

Occupation 01/01/1940
Date of Birth (Mo/Da/Yr) Date of Death (Mo/Da/Yr)

Spouse: Sheldon Peabody
First Name and Initial Last Name Social Security Number

Occupation Scientist
Date of Birth (Mo/Da/Yr) Date of Death (Mo/Da/Yr)

Contact Information:

Street Address Apartment Number

City State ZIP or Postal Code

Province or County

Foreign Country

Taxpayer Daytime/Work Phone Spouse Daytime/Work Phone

Taxpayer Evening/Home Phone Spouse Evening/Home Phone

Taxpayer Cell Phone Spouse Cell Phone

Taxpayer Fax Number Spouse Fax Number

Taxpayer Email Address

Spouse Email Address

Preferred Method of Contact

May the IRS or other taxing authority discuss the return with the preparer? Yes No
Is the taxpayer claimed as a dependent on someone else's tax return?

Are you considered legally blind per IRS regulations? Taxpayer Spouse
Yes No Yes No
Do you want to contribute to the Presidential Election Campaign Fund?