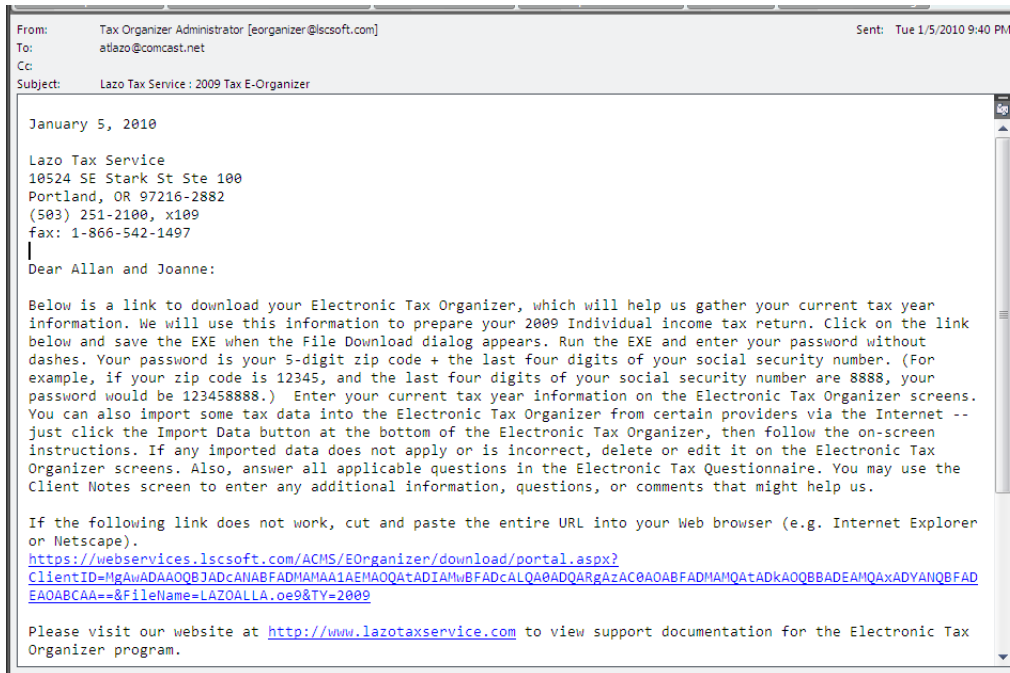


LAZO TAX SERVICE E-ORGANIZER PROGRAM

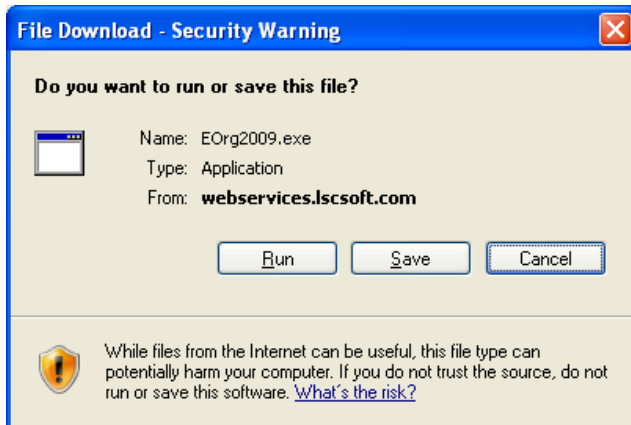
SAVING THE SETUP PROGRAM TO YOUR COMPUTER...

(Note: Instructions and examples prepared using a Microsoft Windows XP operating system, Microsoft Outlook, and some screenshots from previous e-organizer versions. The appearance of some examples may differ slightly depending upon your computer's particular operating system.)

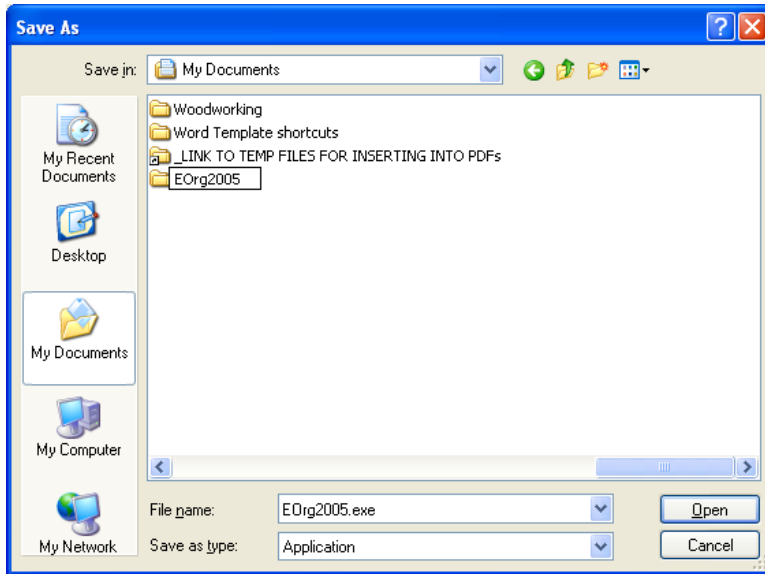
- 1) You will have received an e-mail containing a link to download the e-organizer setup program similar to the image below. Click on the link as indicated in the e-mail.



- 2) Depending upon your computer system and security settings, you may receive a file download security warning and will be asked "Do you want to run or save this file?" Select "Save:"

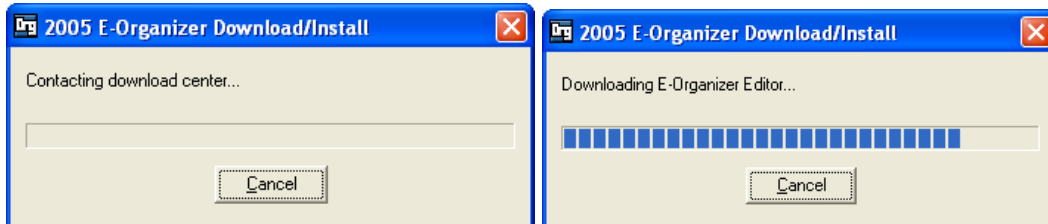


Select a location on your computer, such as your “My Documents” folder, and create a new folder named “EOrg2009” in which to save the EOrg2009.exe file:



Open your “My Documents” folder (or the folder into which you saved the file above), and double-click on the “EOrg2009.exe” file to begin downloading the necessary electronic organizer program files to your computer.

You will receive the following screens and your computer will need to connect to the Internet:



GETTING STARTED...

After completing the step above, the e-organizer program automatically will install, then launch, and you will be asked to enter your password.

Your password is your 5-digit zip code + the last four digits of your social security number, entered without any dashes or spaces. (For example, if your zip code is 12345, and the last four digits of your social security number are 8888, your password would be entered as 123458888.)

2009 Tax Organizer - Enter Password

Welcome to the E-Organizer.

This program allows you to enter your 2009 tax organizer data on-screen and then return it to your preparer via email.

You may also print the information or save it to a disk, then return it to your preparer through the mail or in person.

To begin, enter your password below (you should have received your password from your preparer).

Your tax preparer:

Lazo Tax Service
10524 SE Stark St Ste 100
Portland, OR 97216-2882
(503) 251-2100, x109

Password:

Continue >>

After correctly entering your password in the above screen, you will see the main e-organizer screen:

2005 Tax Organizer

Sections

- Introduction
- How to Use E-Organizer
- E-Organizer FAQs
- Instant Data Entry FAQs
- Letter
- General
- Taxpayer Information
- Direct Deposit of Refund
- Questions for my Preparer
- Questionnaire
- Payments And Penalties
- 2005 Estimates (Form 1040-ES)
- Income
- Wages, Salaries, Tips (W-2)
- Interest Income (1099-INT)
- Sale of Investments / Home
- Deductions
- Retirement / Other Deductions
- Itemized Deductions (1098)

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 several ways to enter your 2005 tax information. You can use any or all of these methods to populate your E-Organizer with data:

- ▶ **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 2005 tax information in the Detail screen that appears on the right.

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

Click the other sections in the list to enter your 2005 tax data.

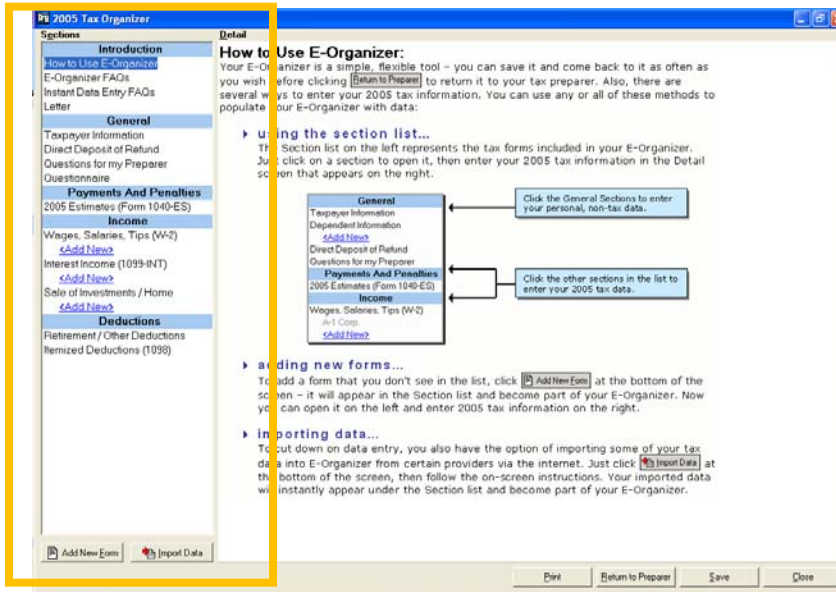
- ▶ **adding new forms...**
To add a form that you don't see in the list, click [Add New Form](#) at the bottom of the screen - it will appear in the Section list and become part of your E-Organizer. Now you can open it on the left and enter 2005 tax information on the right.
- ▶ **importing data...**
To cut down on data entry, you also have the option of importing some of your tax data into E-Organizer from certain providers via the internet. Just click [Import Data](#) at the bottom of the screen, then follow the on-screen instructions. Your imported data will instantly appear under the Section list and become part of your E-Organizer.

Add New Form Import Data

Print Return to Preparer Save Close

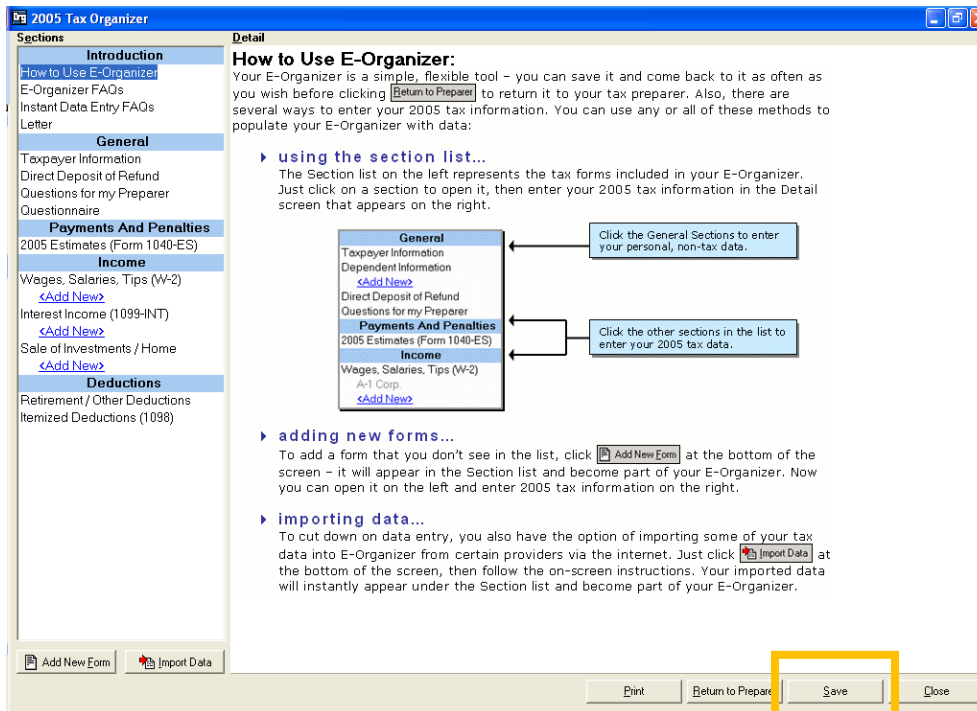
ENTERING YOUR INFORMATION...

Click on the sections on the left side of the screen to enter your information for the 2009 tax year. For example, if you click on “Dividend Income (1099-DIV)” you will receive a similar screen:

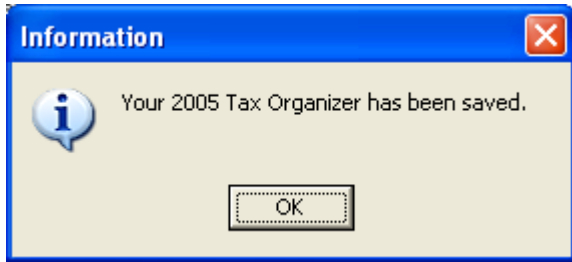


SAVING YOUR INFORMATION AND COMPLETING YOUR ORGANIZER LATER...

To save the information you have entered and complete and return the e-organizer later, choose save from the main e-organizer screen:



The program will confirm your information has been saved:

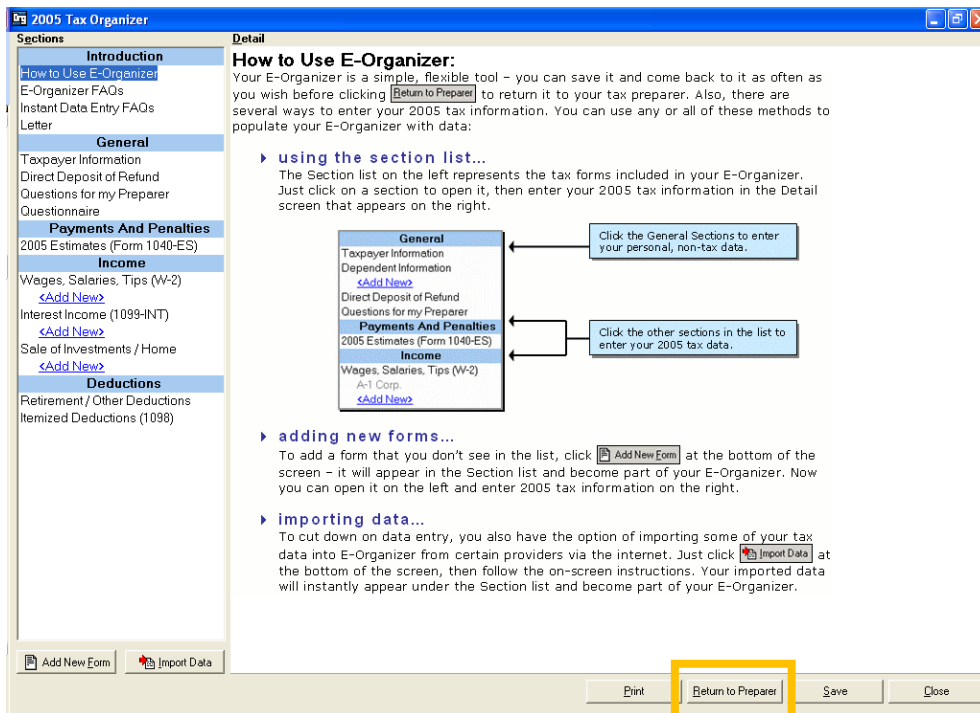


You can reopen the e-organizer program by double-clicking on the "EOrg2009" icon created on your desktop by the download program:

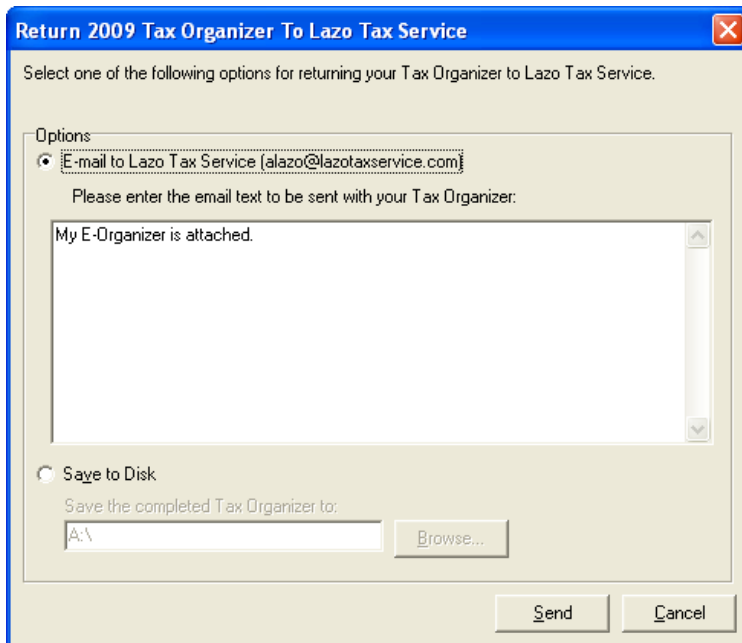


RETURNING YOUR E-ORGANIZER TO US...

When you are ready to return your e-organizer to us, select the "Return to Preparer" button near the bottom of the main input screen:

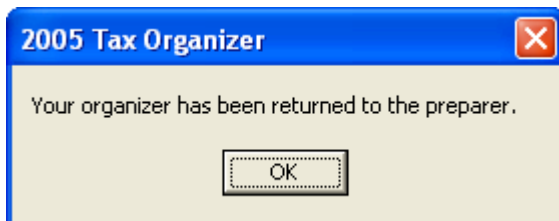
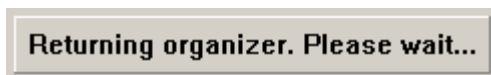


You will see a screen that allows you to enter an e-mail text message to us:



(Note: You must either be connected to the Internet or allow your computer to launch your Internet connection when you return the file to us.)

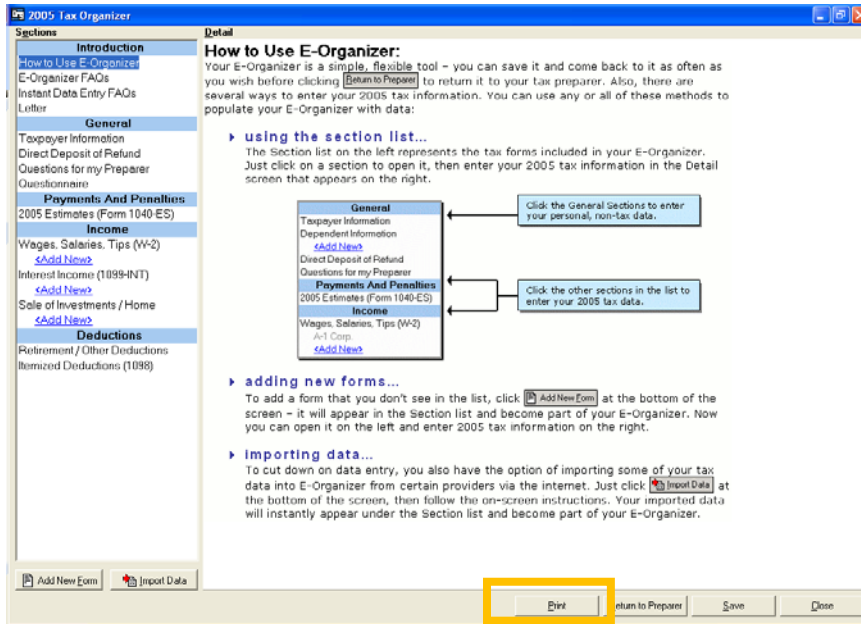
You will receive the following screens as your computer connects to the Internet and returns your file to us:



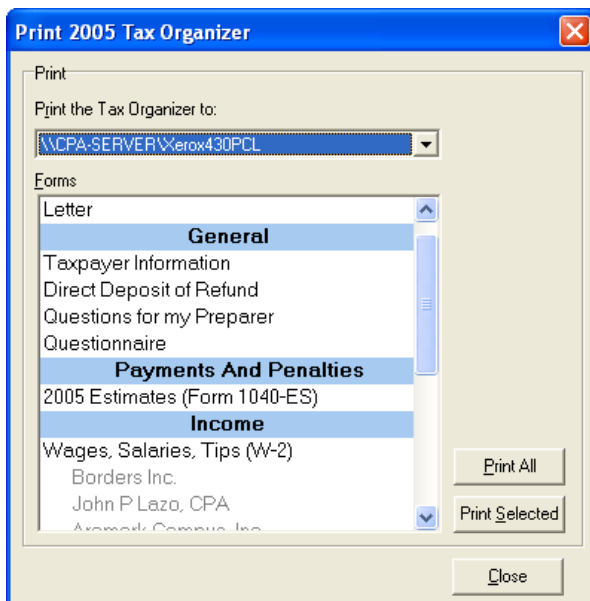
When the step above is successfully completed, the e-organizer program returns your data file to us via e-mail. (Note: The e-organizer program contains its own e-mail utility, and you will not see a copy of the e-mail that is sent to us in your normal e-mail program. Also, under normal circumstances, it will not be necessary for you to send us a separate e-mail with any of the e-organizer files attached.)

PRINTING YOUR E-ORGANIZER INFORMATION...

You may print the information in your e-organizer by using the “Print” button at the bottom of the main entry screen:

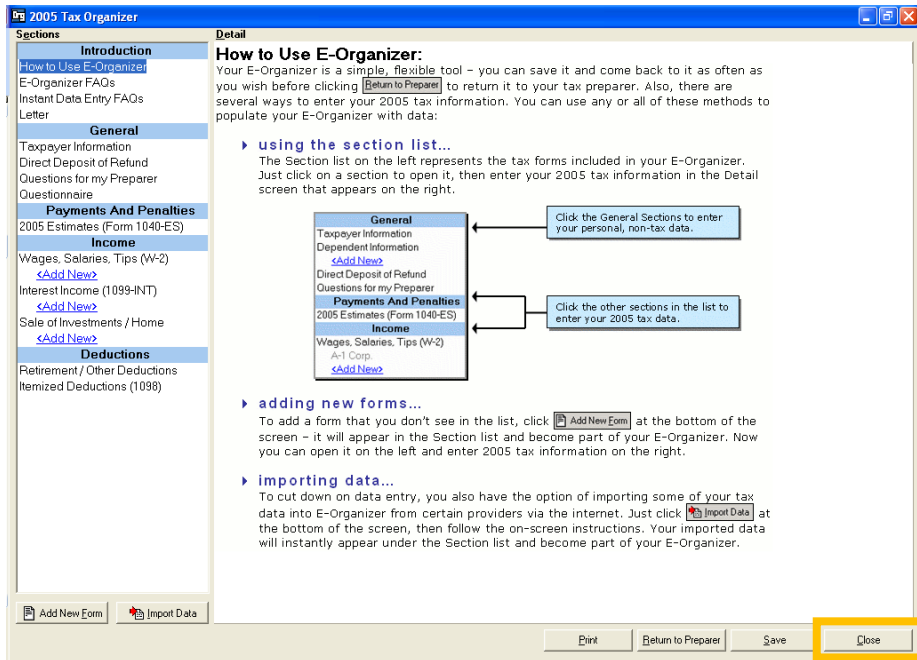


You then will see the print dialog box, which allows you to select a printer and select either individual sections or all of the organizer information to be printed:

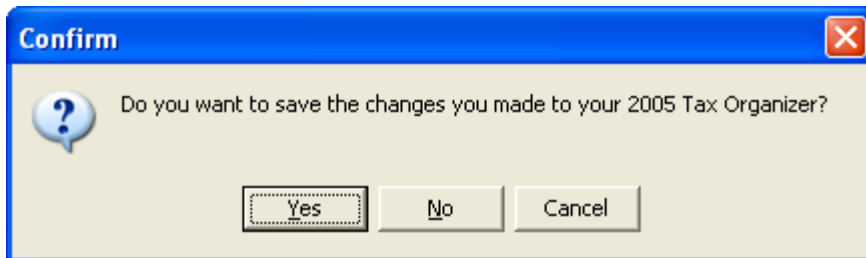


CLOSING THE E-ORGANIZER PROGRAM...

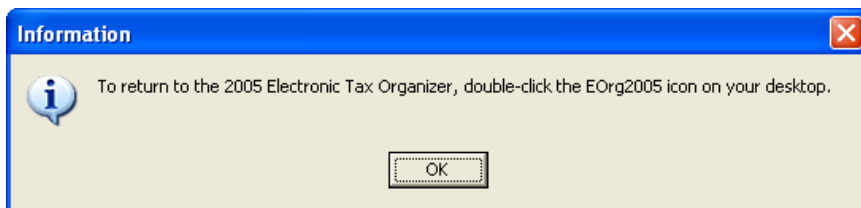
- To close the e-organizer, choose “Close” from the main e-organizer screen:



The program will ask if you would like to save the changes you have made:



When the information is successfully saved, the following screen will appear. Click “OK” to exit the program:



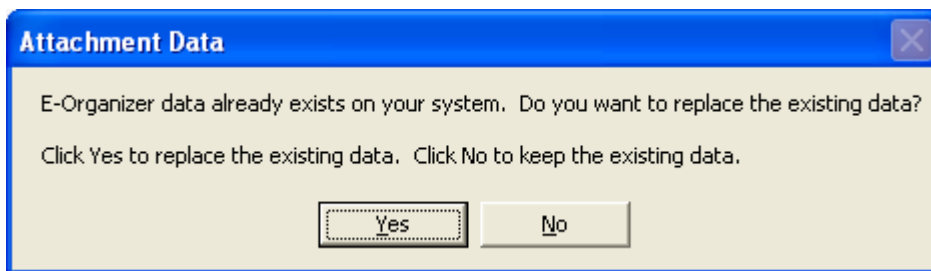
REOPENING THE E-ORGANIZER PROGRAM...

As instructed above, to reopen your e-organizer later, double-click the “EOrg2009” icon that the setup program has created on your desktop:



[Note: Do not reopen the original e-organizer download program (EOrg2009.exe) that you saved to your computer in the initial “Saving the setup program to your computer” step. Instead, follow the step above on this page to reopen the e-organizer with your saved information.

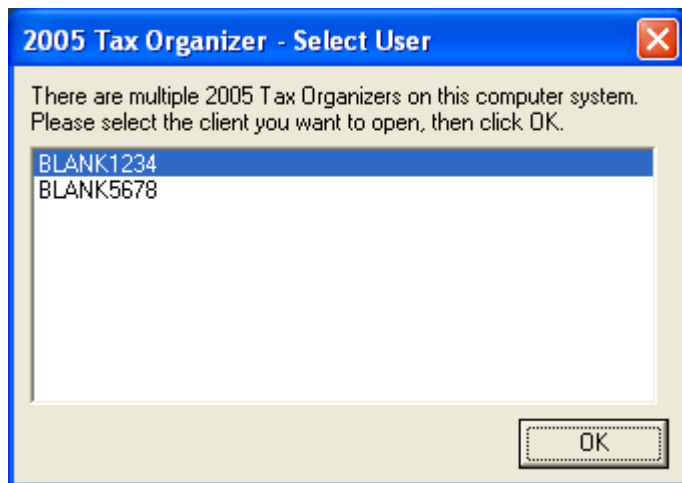
If you inadvertently relaunch the original e-organizer setup file, the program will warn you that you are about to overwrite existing data:



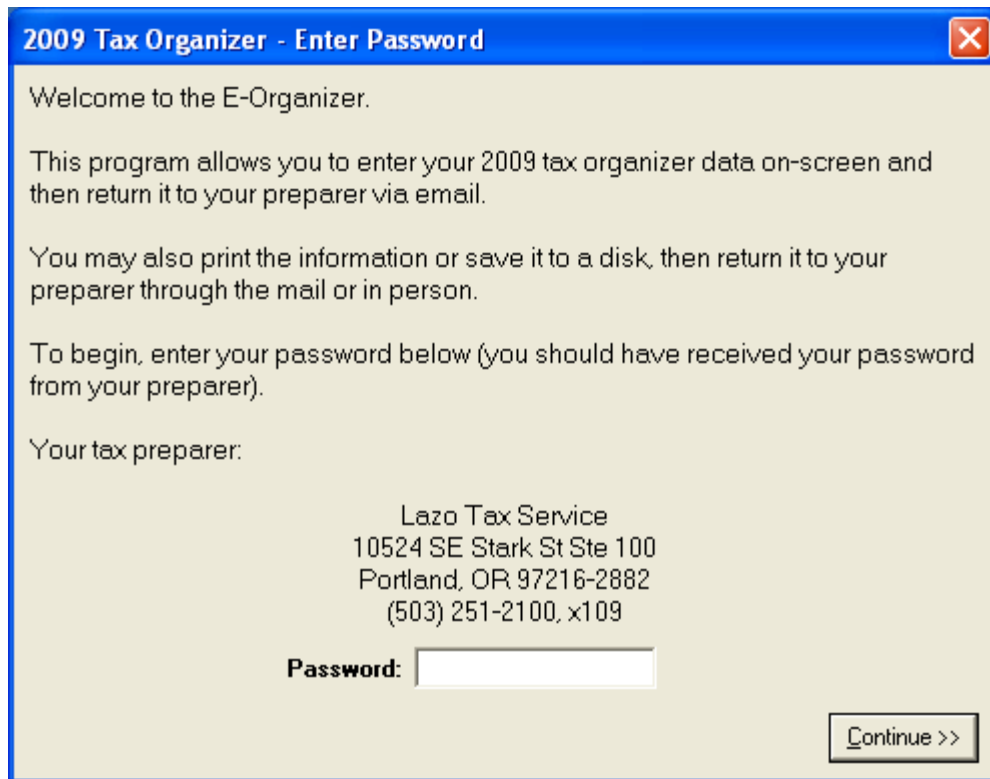
Unless you intend to replace information you already have saved, select “No” if you see the above screen.]

SPECIAL CIRCUMSTANCES: MULTIPLE E-ORGANIZERS FOR DIFFERENT INDIVIDUALS ON THE SAME COMPUTER...

Please note: If you receive multiple e-organizers for different individuals, you can save them to the same computer. You will be asked to select which e-organizer you would like to open when you launch the e-organizer program:



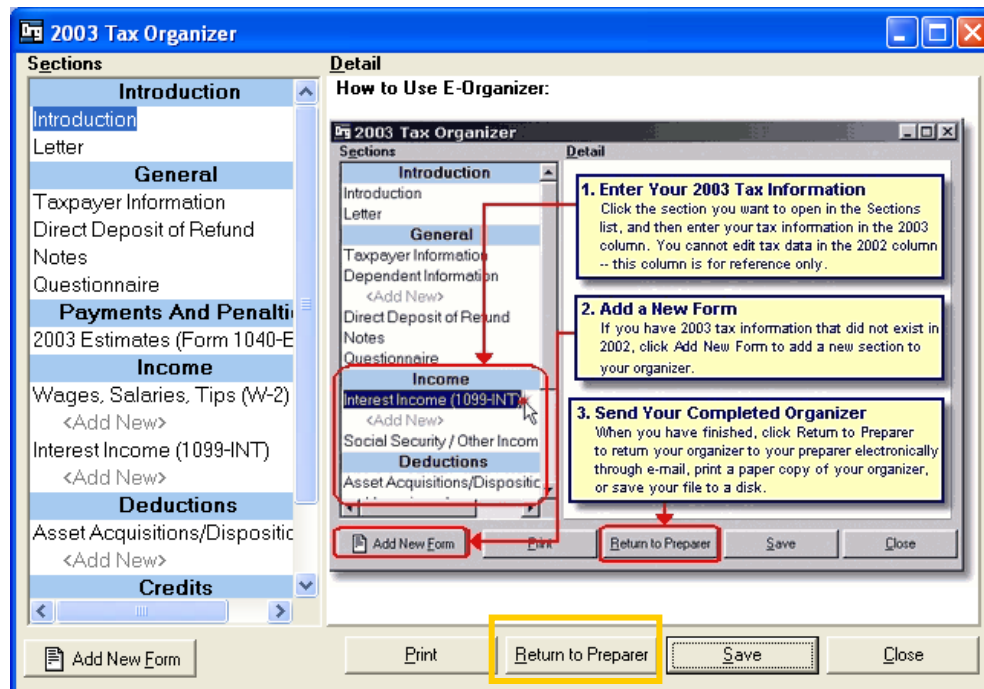
You then will be asked to enter the password for the specific e-organizer you are trying to open.



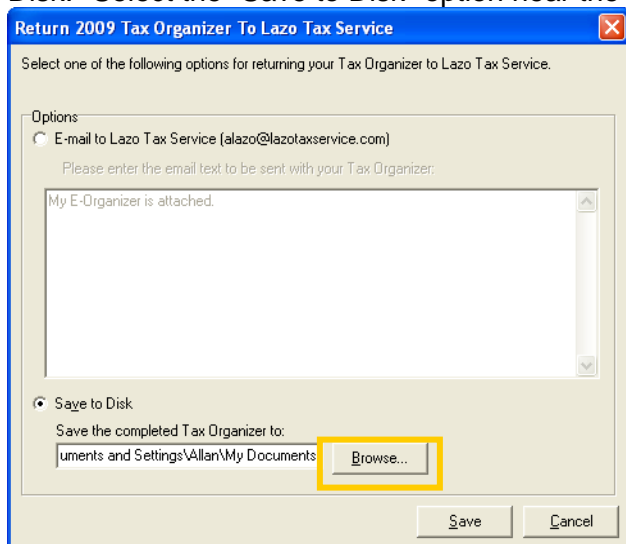
SPECIAL CIRCUMSTANCES: RETURNING YOUR E-ORGANIZER BY FIRST SAVING TO DISK AND THEN ATTACHING TO AN E-MAIL

To save your e-organizer to your computer, follow these steps to first save the file to your computer and then attach the file to a separate e-mail outside of the e-organizer:

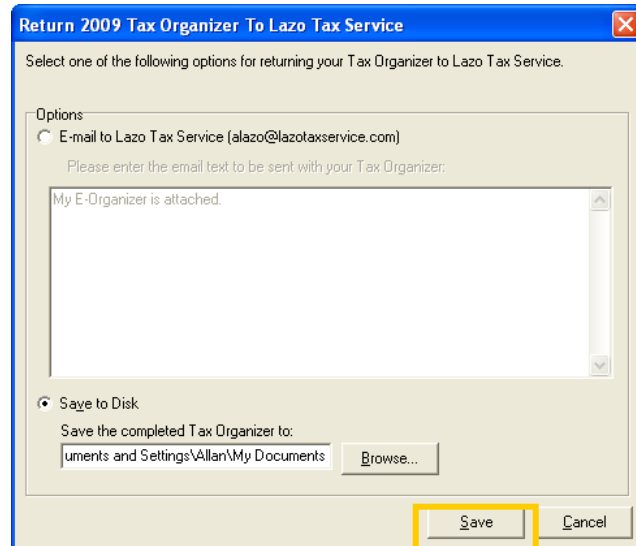
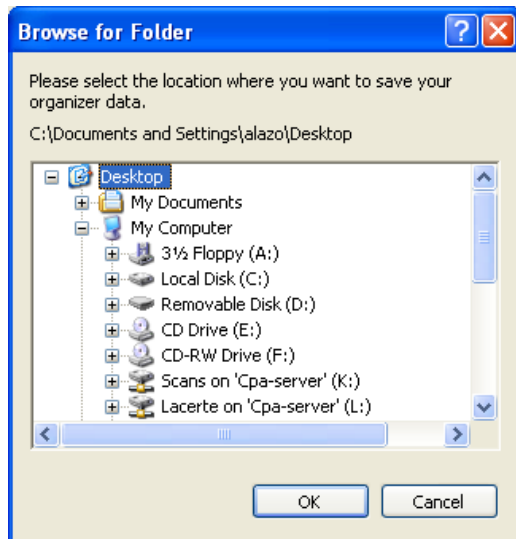
1. Launch the E-organizer 2009 program.
2. In the main screen, click on the "Return to Preparer" button in the lower right-hand corner of the screen.



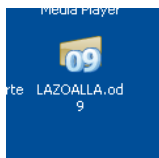
3. You will see a dialog box with options to "E-mail to Lazo Tax Service" or to "Save to Disk." Select the "Save to Disk" option near the bottom of the dialog box.



- Click the "Browse..." button and select your computer's "Desktop" as the location to save the file, and then click "OK" and then "Save."



- Close the E-organizer 2009 program, saving your work when you exit the program.
- The file we need sent to us now will be saved on your computer's Desktop. The file will have a name similar to "LAZOALLA.od9" and will appear on your desktop with an "09" icon, as shown below.



- Launch your regular e-mail program or connect to your Internet e-mail. Create a new e-mail addressed to "alazo@lazotaxservice.com" and attach the file from step #5 to the e-mail, and then send to us.