



TRANSPORT WORKERS TAX SERVICE, LLC 2010 TAX ORGANIZER

This tax organizer is designed to help you collect and report the information needed to prepare your Schedule A line 21 tax deductions by focusing attention on your specific needs as a Merchant Mariner.

In addition to the general questions, please provide us with the following information:

- Certificates of Discharge or Letters of Sea Time
- **Voyage Schedules for all ships.** (Feel free to contact us to see if we have your vessel schedule in our database. *If we do not, it is your responsibility to provide us with one*).

**IF YOUR ORGANIZER IS COMPLETE, WE WILL PROCESS YOUR SCHEDULE A
LINE 21 DEDUCTIONS ASAP!**

Our fee for processing your Schedule A line 21 mariner deductions is \$300. Enclose a check for \$300 made out to "Transport Workers Tax Service" or call us with credit card information. Be sure to fill out both merchant mariner job expense sheets completely!

If you wish to receive a full copy of the IRS substantiation for your records, please enclose an additional fee of \$20 and check the box:

REFERRED BY: _____

PERSONAL INFORMATION

	Taxpayer	Spouse
Last Name		
First Name & Initial		
Social Security Number		
Occupation		
Date of Birth		
Email Address		
Cell Phone		
Home Phone		
Mailing Address		
City, State, & Zip		
*School District/COUNTY		

***VERY IMPORTANT for State Returns**

DO YOU WANT YOUR RETURN FORWARDED
DIRECTLY TO YOUR PREPARER?

Yes

No

If yes, please provide mailing and contact information:

Name of Preparer: _____

Firm Name: _____

Street Address: _____

City/State/Zip Code _____

DID YOU ITEMIZE YOUR DEDUCTIONS LAST YEAR?

Yes

No

DID YOU HAVE ALTERNATIVE MINIMUM TAX LAST YEAR?

Yes

No

(see line 45 on your 2009 tax return) If you encountered AMT on your 2009 tax return we suggest that you complete your 2010 tax return and plug \$10,000 on line 21 of your Schedule A prior to remitting your paperwork. This will ensure that you have a tax savings as a result of including your mariner job expenses.

PLEASE NOTE NEW ADDRESS

MERCHANT SEAMAN JOB EXPENSES

TWIC Card - Including travel expenses	
Maritime License Renewal Fees	
Union Dues	
Other Related Organization Dues (Vacation Dues)	
Seaman Related Publications	
Log Books	
Maps and Charts (Sectionals, etc.)	
Luggage Used in Employment	
Safety Equipment, Flashlights, and Tools	
Computer Used in Employment	
Explain how it was used:	
Computer Software Used in Employment	
List software:	
Other Hardware (GPS, Moving Maps, etc.)	
Cab Fare, Bus Fare, Rental Cars (Away from assigned base only)	
Passport and Visas (If required)	
Phone Calls (When away from home)	
Cellular Phone (If needed for assignment calls)	
Other Miscellaneous Travel Expenses While at Sea	
Explanation of Above Items:	
Meals (While under Certificates of Discharge) ONLY when NOT available on the ship	

Include only expenses YOU incurred.

SHIP(S) SAILED ABOARD THIS YEAR

**ENCLOSE CERTIFICATES OF DISCHARGE/LETTERS OF SEA TIME
AND VESSEL SCHEDULES**

Vessel Name	Dates	Ship's Email Address

NOTE: Although you are not required to have receipts for expenditures less than \$75, except for lodging, we suggest you keep them. We have a daily expense log that we would be happy to provide you, just call us at 410-860-8450 or visit our website at www.transport1040.com. **Also, we request that you NOT enclose your expense receipts with your package. We ask that you keep the receipts for your records and merely list the total amounts on the organizer.**

Telephone: 410-860-8450 Email : TWTS@transport1040.com Fax: 410-203-1781
or visit us at www.transport1040.com

MERCHANT MARINE JOB SEARCH EXPENSES

List each city you travelled to through the year, going to union halls seeking work. It is essential that you list all cities and how many days you were there. For example: 6 days in Baltimore, 3 days in Oakland, etc. Be sure to list hotel and meal expenses in each city.

City	# of Days	Total Dollar Amount Spent for Each of the Following:				Total Mileage
		Meals	Hotel	Airfare, Bus, etc.	Rental Car	

Other Expenses (Please Explain): _____

SAILOR CONTINUING EDUCATION EXPENSES

Educational Transportation Costs including US Coast Guard License Renewal

City	# of Days	Total Dollar Amount Spent for Each of the Following:				Total Mileage
		Meals	Hotel	Airfare, Bus, etc.	Rental Car	

Other Expenses (Please Explain): _____

Education Costs

Tuition	
Books	
Course Supplies	
Phone Calls While at Education Site(s)	

Any Education Reimbursements? (1099-Misc) If so, how much and how was it paid:

OTHER TRANSPORTATION EXPENSES

(TRAVEL TO MEET THE SHIP, PORT TRANSPORTATION, ETC.)

Include dollar amounts on wage pay off from shipping companies. **If they reimbursed you for out-of-pocket expenses and it is on your wage payoff sheet, you are paying income taxes on the reimbursement.**

Total: \$ _____

*Please note: Mileage rate for 2010 is \$0.50/mile.

On worksheets, include only expenses you incurred.

Thank you for taking the time to fill out our organizer. Feel Free to contact us at 410-860-8450 with any questions. Please mail completed organizer to either of the following addresses:

Transport Workers Tax Service, LLC
PO Box 1423
Ellicott City, MD 21041

Transport Workers Tax Service, LLC
3600 Saint Johns Lane
Ellicott City, MD 21042

Be sure to fill out both merchant mariner job expense sheets completely!

IF YOU WISH TO PAY BY CREDIT CARD, PLEASE PROVIDE THE FOLLOWING:

We accept Visa, MasterCard, & Discover. We do **NOT** accept American Express.

Name on card: _____

Billing address: _____

Card Number: _____ Exp Date: _____

Security Code: _____ (3 digit #) Signature: _____