



# TRANSPORT WORKERS TAX SERVICE, LLC 2009 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 WITHIN 7 DAYS!**

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		
<b>*School District/COUNTY</b>		

**\*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 2008 tax return) If you encountered AMT on your 2008 tax return we suggest that you complete your 2009 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.

**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](http://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](mailto:TWTS@transport1040.com)  
or visit us at [www.transport1040.com](http://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 2009 is \$0.55/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 3604**  
**Salisbury, MD 21802**

**Transport Workers Tax Service, LLC**  
**31400 Winterplace Parkway, Suite 100**  
**Salisbury, MD 21804**

**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: \_\_\_\_\_