



**Welcome** to the Amended Return Client Organizer. Please use only information for the year you are amending. We must have a copy of the original return, both federal and state, and the original W-2s. If you do not have a copy of the original return, give us a call and we will assist you in getting a copy from the IRS. If you have any questions about completing this Organizer, don't hesitate to contact us!

PERSONAL DATA (Please Print)

First Name	M.I.	Last Name (as on your SS Card)	Social Security Number	Date of Birth	Sex
Taxpayer:					<input type="checkbox"/> M <input type="checkbox"/> F
Spouse:					<input type="checkbox"/> M <input type="checkbox"/> F
Street Address		Apt. #	City	State	Zip Code
Current Tax Address:					
Mailing Address:					
<i>Tax Address: The current state to which you pay tax and the address we use on your tax return. Note: Must be able to receive mail.</i>					
<i>Mailing Address: The address where we mail your documents if different from your tax address.</i>					
Occupation	Airline	Base	Employee #	Date of Hire	Home Telephone
Taxpayer:					
Spouse:					
Email Address:		Cell Phone Number:		Preferred Name or Nickname:	
Best way to contact you:		Spouse's Cell Number:		Spouse's Preferred or Nickname:	

Yes		No	Please Answer All Questions	
<input type="checkbox"/>	<input type="checkbox"/>		Has this return ever been amended?	
<input type="checkbox"/>	<input type="checkbox"/>		Do you owe any back taxes to the IRS or your state?	
<input type="checkbox"/>	<input type="checkbox"/>		Do you have any delinquent student loans or owe back child support?	
<input type="checkbox"/>	<input type="checkbox"/>		Did the IRS garnish your refund for the amended year?	
<input type="checkbox"/>	<input type="checkbox"/>		Did you pay to have your original return prepared? If yes, who prepared the original return?	

**NOTE**  
When completing this Organizer, only list items in sections A–J that were not reported on the original return or if they differ from the original amounts reported. However, the Professional Deduction section must be filled out with all expenses even if they were reported on the original return.

**ORIGINAL TAX RETURN & W-2'S**  
In order to amend your tax return, we must have a copy of the original return (Federal & State) and W-2s. We will amend your state return if it is affected by the changes on the Federal Return. If you do not have or cannot find a copy of your original return, you can request a copy of it and the W-2s from the IRS. We can provide you with the proper form to file with the IRS to request a back copy of your return or you can download this form from our website at [www.flightax.com](http://www.flightax.com). Please do not send your information to us until you have a copy of the original return.

# Pilot-Tax Amended Return Organizer

## Questions? 317-984-7666

**A. INTEREST INCOME**

Provide all 1099 interest statements for you, your spouse and any dependents under the age of 24. If your child files their own tax return and their interest and dividends earned exceed the Kiddie Tax Rate for the Amendment year, it must be reported on your return or be taxed at your tax rate on their return. **Please provide the original Forms 1099-INT or other statements reporting interest income.**

Owner SSN	Institution	Amount
- -		\$
- -		\$

**B. DIVIDEND INCOME**

Provide all 1099 dividend statements and state information that accompany the 1099 and all year-end summary statements. We need these statements for you, your spouse, and any dependents under the age of 24. If your child files their own tax return and their interest and dividends earned exceed the Kiddie Tax Rate for the Amendment year, it must be reported on your return or be taxed at your tax rate on their return. **Please provide the original Forms 1099-DIV and all year-end summary statements.**

Owner SSN	Institution	Amount
- -		\$
- -		\$

**C. STOCKS & BONDS SOLD\***

The information below **MUST** be provided. Provide your complete year-end statement including the 1099-B from your broker. Purchase price (cost basis) must be provided.

Description and Quantity	Purchase Date	Sale Date	Proceeds	Purchase Price Cost Basis
			\$	\$
			\$	\$
			\$	\$

**D. DISTRIBUTIONS FROM PENSIONS, ANNUITIES, ETC.\***

Please list the institutions and provide the following information for which 2013 distributions (pensions, annuities, retirement, profit sharing plans, IRAs, etc.) were received for you and your spouse. **Please provide the original Forms 1099-R.**

Institution	Taxpayer or Spouse?	Date of Distribution	Reason for Distribution	Amount rolled over, if any
	<input type="checkbox"/> T/P <input type="checkbox"/> S			\$
	<input type="checkbox"/> T/P <input type="checkbox"/> S			\$
	<input type="checkbox"/> T/P <input type="checkbox"/> S			\$
	<input type="checkbox"/> T/P <input type="checkbox"/> S			\$

**E. MOVING EXPENSES\***

Only report job related relocations of primary residence below. See Professional Deductions for relocation of commuter pad.

Moved Primary Residence From:		Old Base:	Number of Vehicles driven:	#
Moved Primary Residence To:		New Base:	Miles driven for move:	#
Distance (Miles from old home to new workplace):	mi.	Lodging Expense (only while in transit):		\$
Distance (Miles from old home to old workplace):	mi.	Moving Expense (material, rental, movers, & storage):		\$
Date Moved:		Was this move for change of job for spouse?		<input type="checkbox"/> Yes <input type="checkbox"/> No

**F. MEDICAL EXPENSES**

Do not include amounts paid by insurance or with pre-tax dollars (i.e. Flexible Spending Account). **Out-of-pocket** expenses must exceed 7.5% of your income. Your state may allow a medical deduction. Therefore, please complete this section to enable you to get the maximum federal and state medical deductions. **Do not include premiums for Accident or Disability insurance.**

Prescriptions	\$	Physician/Dentist/Chiropractor	\$
Long-Term Care Expenses (not covered by insurance)	Taxpayer \$	Long-Term Care Insurance Premiums Paid	Taxpayer \$
Insurance Premiums— <b>Not Pre-Tax</b>	\$	Hospital	\$
Co-Pays	\$	Lab Fees	\$
Contacts/Glasses	\$	Laser Eye Surgery/Lasik	\$
Psychotherapy/Counseling	\$	COBRA Premiums	\$
Miles Driven for Medical 01/01/____-06/30/____	mi.	Miles Driven for Medical 07/01/____-12/31/____	mi.

**Health Care Tax Credit**—send us form 8885 or Form 1099-H. You should receive either of these forms if you are eligible.

If you took a withdrawal from your Health Savings Account, was it for medical purposes?  Yes  No

Do not include rental property expenses.

Provide 1098 statement from mortgage company. If you purchased, sold, or refinanced, send a copy of the closing statement.

G. HOMEOWNER INFORMATION

Mortgage Interest on Principal Residence	\$	Real Estate Taxes on Principal Residence	\$
Home Equity Interest or 2nd Mortgage on your Principal Residence	\$	All other Real Estate taxes paid on personal residences, including vacant land.	\$
Mortgage Interest on 2nd Home	\$	Real Estate Taxes on 2nd Home	\$
Did you sell your home in the amended year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, send in purchase & sale closing statements.	
Was this property your primary residence for 2 of the past 5 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Number of years in home before sale:	
Was an office in home deduction ever taken?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, please provide tax return from each year taken (new clients).	
Was this home ever used as a rental property?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, please provide tax return from each year rented (new clients).	
Did you refinance your home in the amended year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, number of years you refinanced: If yes, provide closing statement.	
Did you purchase your home in the amended year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, send in closing statements and PMI amount paid.	

Note: Interest paid on a boat/RV will qualify as a deduction if it has a lavatory and a range.

If you pay Real Estate Taxes and are not able to itemize, a deduction will still be taken for the real estate tax paid during the amended year.

**IRS Requirements for Cash Contributions:** You cannot deduct a cash contribution, regardless of the amount, unless you keep as a record of the contribution a bank record (such as a cancelled check, a bank copy of a cancelled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and amount of the contribution.

<b>Cash</b>	Church	\$	Official Charities	\$	Airline Charity	\$
	School/Education Contributions	\$	Charitable Miles Driven			mi.

The IRS requires written acknowledgement (1098-C) received from the charitable organization be attached to the return if you are taking a deduction over \$500. If your donation was valued at less than \$500 please complete the following:

<b>Vehicle</b>	Name of Charitable Organization:						
	Date of Donation			Make and Model of Vehicle			
	Fair Market Value under \$500			\$	Original Purchase Date & Price		\$
	Method to determine value:			How acquired?			

H. CHARITABLE CONTRIBUTIONS

**IRS Requirements for Non-Cash Contributions:** The IRS requires an itemized list of all items donated and a receipt from the charitable organization. Name and address are required for any donation over \$500. Please make sure your receipt has a dollar value on it; if over \$500, you must submit the receipts.

<b>Non-Cash</b>	Charitable Organization receiving donated goods:						
	Address of this organization:						
	Do you have an itemized list and the corresponding receipt? <input type="checkbox"/> Yes <input type="checkbox"/> No						
	Date of Donation				Resale Value of Furniture		\$
	Original Purchase Date:				Resale Value of Clothing		\$
	How acquired? (purchase, inheritance, gift):				Resale Value of Appliances		\$
	Original Purchase Price:			\$	Resale Value of Household Items		\$

<b>Non-Cash</b>	Charitable Organization receiving donated goods:						
	Address of this organization:						
	Do you have an itemized list and the corresponding receipt? <input type="checkbox"/> Yes <input type="checkbox"/> No						
	Date of Donation				Resale Value of Furniture		\$
	Original Purchase Date:				Resale Value of Clothing		\$
	How acquired? (purchase, inheritance, gift):				Resale Value of Appliances		\$
	Original Purchase Price:			\$	Resale Value of Household Items		\$

**Questions? 317-984-7666**



# PROFESSIONAL DEDUCTIONS

## Uniform Items Purchased

Enter the total amount of payroll deducted uniform items. For most airlines, this amount can be found on the last pay check stub of the year. \$

Enter additional "out of pocket" uniform expenses below. Do not include items provided by the company through replacement programs. You need a receipt for each item purchased, regardless of the amount. The \$75 rule does not apply as this is not a travel related deduction. Uniform items must have a company insignia or logo; no type of "street" clothes qualify for the deduction.

Uniform Items	Amount
Uniform Belt	\$
Uniform Epaulets	\$
Uniform Jacket	\$
Uniform Hat	\$
Uniform Pants	\$
Uniform Shirt	\$
Uniform Sweater	\$
Uniform Tie	\$
Uniform Winter Coat, Gloves, Cap	\$
Uniform Shoes (must be purchased from a Uniform Store)	Amount
Uniform Shoes	\$
Shoe Repair	\$
Shoe Shine	\$
Uniform Maintenance	Amount
Uniform Alterations	yearly amount \$
Home Laundering	monthly amount \$
Laundering	monthly amount \$
Dry Cleaning	monthly amount \$
<b>Airline Reimbursement Amount</b>	\$

If you were reimbursed for any of your uniform maintenance expenses such as alterations or dry cleaning, do not include these amounts. We cannot take a deduction for any expense for which you were reimbursed. IRS regulations go even a little further. We cannot take a deduction for any expense for which you COULD have been reimbursed. For example: if your airline will reimburse you for your uniform alteration expenses but you just did not get around to submitting your receipts for reimbursement. The IRS will not allow this expense as a deduction because you 'could' have been reimbursed. Thus, do not include any expenses for which you were reimbursed, or any expenses for which you could have been reimbursed, but were not.



Please be aware that you, as the taxpayer, are responsible for keeping all evidence and support of all items reported on your tax return (flight schedules, log book, receipts, wage forms, and all other support) for a period of at least five years.

## Transportation Expenses

### Layover Transportation

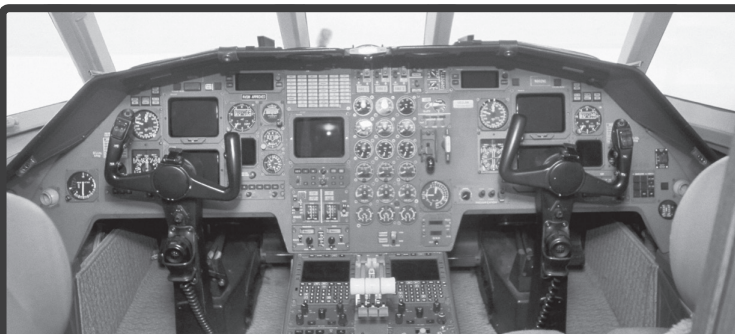
Transportation between places of lodging and places where meals are taken, are included in the "Incidental Expenses" portion of your per diem; therefore, no separate deduction is allowed. See IRS Pub. 463

Satellite/Co-Terminal Transportation	Amount
Three Letter Airport Code	
Number of Round Trips Per Year	
Cost Per Round Trip or Mileage Driven	
Three Letter Airport Code	
Number of Round Trips Per Year	
Cost Per Round Trip or Mileage Driven	
If you cover more than one airport, transportation between your base (company mailbox) and another airport is deductible. Do not include expenses for transportation to your base (company mailbox) or home.	
Other Related Expenses	Amount
Airport Parking Expense	\$
Reserve Emergency Cab Fares	\$

## Computer & Related Expenses

**Computers are not deductible.** The IRS has issued a Letter Ruling (#8615024 & Bryant, U.S. Ct. App. 3rd cir. 74 AFTR2d 94-5440) disallowing a deduction for home computers. The ruling states... "Despite legitimate business use, employees generally may not write off the cost of their computer. By law, a computer must be used for the convenience of the employer and required as a condition of employment." In private rulings, the IRS ruled an individual may not claim depreciation when the purchase of a computer is optional and not absolutely required by their employer as a condition of employment. All airlines provide computers for their employees to use. Although they are a huge asset to our jobs, the airline does not require that we have a personal computer or laptop.

Printer/Software Deductions	Amount
Yearly Cost of Paper for Company Usage	\$
Yearly Cost of Toner/Ink Cartridges for Company Usage	\$
Bidding Computer Software	\$
Trip Trading Computer Software	\$
Internet/Online Services	Amount
Airline Schedule Service Fees i.e. Flightline, FLICA, etc.	\$
Yearly Cost of Home Internet Access Fees, DSL, Cable, Aircard, VoIP, Skype	\$
Yearly Cost of Hotel Access Fees (paid while on layovers)	\$



**Remember!** Amounts are annual totals unless otherwise specified.

## Travel/Required Items

Your profession requires you to have specific items for travel and to perform your job in areas of service and safety. Enter the expense below for the items you have purchased during the applicable tax year. Receipts are required for items priced over \$75.00 each. If you purchase an item that is under \$75.00 you need to make a record of that purchase in your log book or on your schedule. **You must have documentation, either a receipt or log book/schedule entry, for each item you list below.**

Travel Related Expenses	Monthly Amount	Yearly Amount	Safety and Professional Items	Amount
Tips to Hotel Van Drivers	\$	\$	Portable Hair Dryer	\$
ATM Fees (while on layovers)	\$	\$	Portable Iron	\$
Check Cashing Fees (while on layovers)	\$	\$	Portable Security Device	\$
Safety and Professional Items			Amount	
Luggage Items (wheels, repairs, locks, lunch bag)		\$	Portable Smoke Detector	
Garment Bag		\$	International Voltage Converter	\$
Flight Kit		\$	International Currency Converter	\$
Luggage Tags		\$	Manual Replacement	\$
Wings		\$	Update and Revision Services	\$
Watch Battery/Repair Expenses		\$	ID Replacement	\$
Airline Access Keys		\$	Company Business Cards	\$
Cockpit Sunglasses		\$	Foreign Visa Expense	\$
Cockpit Supplies (maps, charts, etc.)		\$	Global Entry Fee	\$
Ear Piece/Headset		\$	Passport Fee	\$
Personal Organizer		\$	Passport Photo Expense	\$
Logbook		\$	Professional Publications	\$
Flashlight		\$	Bid Service Fees	\$
Batteries		\$	2nd Language Education Expense	\$
Portable Alarm Clock		\$	Drug Testing Fees	\$
Portable Curling Iron		\$	Dues for Pilot Organizations	\$
			FAA Medical Expenses	\$

## Communications

Your profession requires you to keep in touch with your employer, your fellow pilots and crew scheduling. We can take a portion of your cell phone expenses for business related calls. Provide your expenses in the area below.

Cell Phone	Yearly Amount	Calling Card	Amount
Cell Phone Purchase (your phone only)	\$	Direct Bill Calling Card <span style="float: right;">per month</span>	\$
Cell Phone Base Charge per Month (single line)	\$	International Prepaid Calling Card <span style="float: right;">per month</span>	\$
% Airline Business Usage per Month: Choose One: <input type="checkbox"/> 40% <input type="checkbox"/> 50% <input type="checkbox"/> 60% <input type="checkbox"/> Other   %		<i>If you fly domestic and don't have a cell phone (yes, it does happen) or are flying international and do not have international service on your cell, the amount you place on a calling card or prepaid calling card is deductible under the same qualifications as your cell phone.</i> Please provide the monthly or yearly dollar amount on your business/layover usage calls.	
Additional Communication Expenses			Amount
Company Fax Expense			\$
Company Copy Expense			\$
Company Mailing Expense			\$
Company Overnight Expense			\$
<i>If you have any expenses related to required communication between you and the company or the union, these expenses are deductible. If you are required to fax a copy of a doctor's note to your supervisor and Kinko's charges you to do this, make sure you save the receipt or put it on a credit card. Enter any expenses for copying, faxing or mailing in these specific entry areas.</i>			

## Temporary Duty/Special Assignment

If you are on Temporary Duty assigned by the company for any reason, your related expenses may be deductible. The IRS defines Temporary Duty as any assignment that has an expected completion date of less than one year. If your assignment is greater than one year, you do not qualify for this deduction.

You may also qualify for some very substantial deductions if you are on a special assignment away from your base. For example, if you are based in New York and accept a training position in Dallas; your housing, meal and transportation expenses are all deductible (assuming these expenses are not provided by the airline).

Do NOT enter any TDY or SPA days that are on your schedule. If you are providing your schedules to us or using our online per diem calculator, we/you will include these dates and locations in your schedule per diem calculations. Only enter days below that are NOT included on your flight schedule.

Temporary Duty/Special Assignment Expenses		Entry
Number of Days on TDY at Location <i>Do not include any days that you had scheduled flying, this deduction will be taken in the per diem section.</i>		
From: To:	Three Letter City Code of TDY Location	
Number of Days on TDY at 2nd Location		
From: To:	Three Letter City Code of 2nd TDY Location	
Local Transportation Expense <i>(rental car, public transportation, etc.)</i>		\$
Were you provided housing for your TDY?		<input type="checkbox"/> Yes <input type="checkbox"/> No
If no, enter cost of housing during TDY.		\$
Commuting Expense during TDY		\$
Utility Expense during TDY		\$
Local/Long Distance Phone Usage during TDY		\$
If you drove to the TDY location and used your car while on assignment, enter the total miles driven from departure until your return.		mi.
Purpose of TDY?		

## Union Expenses

As a unionized employee, your union dues, initiation fee and any union publications are all deductible. If you actually work for the union as a union rep. or direct employee, you will have additional deductions. Please download our Union Rep. Worksheet at [www.Pilot-Tax.com](http://www.Pilot-Tax.com).

Union Expenses	Amount
Union Dues <i>(amount actually paid during year)</i>	\$
Union Initiation Fees	\$
Union Publications	\$
Travel Expense for Union Meetings/Events	\$



American Airlines

### Get your Pilot-Tax App!

Now available for your Droid!

(soon to be available for most airlines)

Download it now from your play store!

## Training

Your job requires, at a minimum, yearly training per the FAA. You are allowed to take a per diem deduction for each day that you spend in training. For example, if you have training in Atlanta, you are allowed a deduction of \$52 for each day you are in Atlanta for training. We are, however, required to subtract the amount of per diem that your airline paid you for your time in training.

If you are based where your training is held, you are NOT allowed to take a per diem deduction for training. As in the example above, if you are based in Atlanta, you are not eligible for this deduction.

An easy way to determine this deduction, in general, if your airline pays you a per diem for your meal expenses during training, you are able to take the per diem deduction based on the city of training. If you are not paid a per diem (excluding initial training) you generally will not qualify for this deduction.

You may also have additional expenses for your time in training. Transportation expenses, housing, cell phone, etc. We have done our best to break down each type of training below for you to benefit from this deduction.

Initial Training	Entry
Number of Days you were in Initial Training	
Three Letter City Code of Training Location	
Days Spent in Initial Training at a Different Location	
Three Letter City Code of 2nd Training Location	
Date Initial Training Started	
Date Initial Training Ended	
Amount of Per Diem Paid for Training <i>(if not included in yearly amount provided by your airline)</i>	\$
Hotel Expense while in Initial Training	\$
Transportation Expense while in Initial Training	\$
Phone Expense while in Initial Training	\$
Recurrent/Upgrade Training	Entry
Number of Days you were in Training	
Three Letter City Code of Training Location	
Days Spent in Training at a Different Location	
Three Letter City Code of 2nd Training Location	
Hotel Expense if not Provided by Airline	\$
Transportation Expense while at Training	\$
Type Rating/Upgrade Training Expenses	Entry
Aircraft/Type Rating Expense	\$
Training Course/DVD Expenses not included above	\$
Ground School Prep Fees	\$
Aircraft of Rating?	
<i>Enter per diem and housing expenses above.</i>	

## Job Search

Due to the instability of the airline industry, more and more of our clients are having job search related expenses. Your cost of finding a job within the airline industry is deductible. What does this mean? The job search expenses of finding another position within the same industry are deductible, the job search expenses of looking outside of the airline industry are NOT deductible.

This is one of those IRS regulations that sometimes does not make sense. If you are a flight attendant and update your resume or fly to an interview, these expenses are deductible. If you do the same for another position outside of the industry, such as a retail position or professional job, these expenses may not be taken as a deduction.

Several of our clients have requested a deduction for the purchase of a new suit or professional attire for the interviewing process. Although this is an additional expense to you, it is not a recognized deduction by the IRS. The only type of clothing that is deductible is that which has a company logo or insignia, such as a uniform.

Qualified Job Search Expense	Amount
Resume Expenses	\$
Fax/Postage/Overnight Delivery	\$
Airline Job Placement Services	\$
Application Fees	\$
Simulator Prep Time for Interview	\$
Airfare for Interview	\$
Airfare for Physical	\$
Hotel Expense for Interview	\$
Hotel Expense for Physical	\$
If you drove to your interview or physical, list the total miles driven round trip for all.	mi.



## Remember!

Amounts are annual totals unless otherwise specified.

**Married Pilots must use a separate form for each person—do NOT combine expenses on one form! If you need another copy, you can download it at [www.pilot-tax.com](http://www.pilot-tax.com).**

**Reserve Emergency Cab Fares—If you are on reserve and get called on a short call that is less than your contractual minimum and the only way you can make the departure is to take a cab/taxi, this fare is deductible.**



## Remember!

Do not send us receipts. Keep them for your records.

## FFDO

Training Expenses	Entry	Training Expenses	Entry
No. of Days you were in Training		Equipment Expense	\$
Three letter City Code of Training Location		Ammunition/Target Expense	\$
Housing Expense during Training	\$	Personal Gun Safe	\$
Travel Expense to/from Training	\$	Permit Fees	\$
Transportation Expense during Training	\$	Range Fees	\$
Local/LD Phone Usage during Training	\$		



If you are based in a foreign country and/or have foreign earned income, do not use this Organizer, please complete the Foreign Domicile Organizer. You can download this Organizer at [www.pilot-tax.com](http://www.pilot-tax.com).

**Questions? 317-984-7666**



## Commuter Pad Moving Expense

If you transferred bases but did not move your primary home, these expenses are considered a professional deduction versus a moving deduction. If you had any expenses related to moving your crash pad or airport car from one base to another, list these expenses below. You must have receipts!

If you changed your tax address and had a full blown move, complete the section in the Organizer for moving expenses.

Commuter Pad Moving Expenses	Entry
Old Base	
New Base	
Distance Driven to Transport Belongings/Vehicle	mi.
Date Moved	
Travel Expense	\$
Shipping Expense	\$
Lodging Expense (only while in transit)	\$



**Remember!** Keep your receipts at all times, even if the item is less than \$75—this will help us in the case of an audit. The IRS will not accept cancelled checks or credit card statements as receipts.

## Military Worksheet

Branch of Military & Rank:		
Are you Active Duty? <input type="checkbox"/> Reservist? <input type="checkbox"/> National Guard? <input type="checkbox"/>		
1st Post of Duty:	Three Letter Code:	
2nd Post of Duty:	Three Letter Code:	
Number of miles from Home to 1st Post:	2nd Post:	
<b>Reservist</b>		
<i>Travel expenses related to your Reservist Activities are deductible. This deduction includes meals, lodging and transportation expense, and is based on the rates applied to federal employees. If you travel over 100 miles from your post of duty, you are no longer required to itemize your deductions in order to receive this benefit, as these expenses are now deducted on the front of the tax return. If you travel 100 miles or less, your deduction will be taken as itemized deductions.</i>		
	<b>1st Post</b>	<b>2nd Post</b>
Number of Nights Spent at Post		
From: To:		
Number of round trips <i>driven</i> to/from Post		
Did the military provide housing?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Hotel/Housing Expense Paid by You	\$	\$
Miles driven while at post in personal car	mi.	mi.
Rental Car Expense	\$	\$
Were you paid a per diem?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
What was the total per diem paid?	\$	\$
<b>General Military Deductions</b> <i>Do not include airline expenses.</i>		
Dress Uniform Purchase	\$	
Dress Uniform Shoes	\$	
Uniform Accompaniments	\$	

<b>General Military Deductions</b> <i>Do not include airline expenses.</i>	
Subscriptions to Military Related Publications	\$
Professional Dues	\$
Job Related Training	\$
Personal Organizer	\$
Log Book	\$
Foreign Visa	\$
Passport Fee	\$
Passport Photo	\$
Uniform Maintenance:	
Home Laundering Expense	\$
Professional Laundering Expense	\$
Dry Cleaning Expense	\$
Shoe Shine/Supplies	\$
Military Business Cards	\$
Military Copy/Fax Expense	\$
Military Mailing Expense	\$
Military Phone Expense	\$
Office Supplies	\$
Misc. (specify)	\$



You may see us in your company publication, on the internet or on your paycheck stub...but nothing is as effective as you telling your friends about Pilot-Tax! To say "thank you" we will give you a referral reward of \$25.00 for each Pilot or Flight Attendant you refer to us or our sister company Flightax.

# PER DIEM DEDUCTION INFORMATION

The government allows a deduction for each day that you are away from base. The IRS states that you can either itemize each layover city or you may take a standard rate per day. It is to your advantage to provide your schedules so your per diem allowance can be calculated based on your specific flying. The IRS will not allow a mix of schedules and days flown! All schedules must include three-letter layover city codes, dates and times of each trip.

Provide all 12 months of Flight Schedules —OR—  complete the Log Book Grid

<b>PER DIEM PAID</b>	<b>We must have the non-taxable per diem amount you were paid!</b> This amount may be found on your W-2 next to the letter "L", or on your last pay stub of the year. <b>If you can't locate it, contact your employer for this required amount.</b>		\$
<b>MONTHS FLOWN</b>	Total Months Flown	months	Did you fly <input type="checkbox"/> Domestic <input type="checkbox"/> International <input type="checkbox"/> Both
	Aircraft flown? (eg. MD80, 737, etc.)		Position? (eg. Captain, 1st Officer, etc.)
	Did you fly for more than one airline during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, provide schedules, last pay stub and W-2's for each airline.</i>		
	For any month during the year in which you were eligible to fly but did not, please explain. <i>(examples: Retired in May, Off work April to August due to reserve activity, Began Maternity Leave in November)</i>		
<b>BASE LOCATION</b>	Base at Start of 2016:	Transfer Date:	Base at End of 2016:

## Provide Schedules

Provide all 12 months of schedules as indicated below by airline. If your airline is not listed, provide schedules which include the required information of three-letter layover city codes, dates and times of each trip. Call our office if you have any questions.

<b>AMERICAN</b>	<p>Flight schedule data will only be accepted electronically via the Pilot-Tax App...saves time and paper! Download the Pilot-Tax App for your Droid phone, or go directly to our website at <a href="http://www.pilot-tax.com">www.pilot-tax.com</a> under START THE PROCESS go to GET SCHEDULES and select your airline. From either place you will be able to securely sign in to our app which will extract your schedules and send them directly to us. If you don't have a Droid or can't access thru our website, give us a call and we can help.</p> <p>Was the Pilot-Tax App used to send your schedules? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Comments:</p>
<b>DELTA</b>	<p>Provide "Monthly Activity Pay Statements" for all 12 months. Obtain these from DeltaNet by selecting Employee Info., then Self Service, then My Pay &amp; Tax Info. Select "Monthly Activity Reports After May 2013". You will need to print each individual month.</p> <p>Comments:</p>
<b>FED-EX</b>	<p>Provide Pilot Per Diem Recap sheets for <b>all 12 months</b>—obtain from "VIPS" system.</p> <p>Comments:</p>
<b>NETJETS</b>	<p>Provide the Crew Member <u>Duty Report</u> for <b>all 12 months</b>—obtain from "CRC Online" within "Crew My Pages".</p> <p>Comments:</p>
<b>UPS</b>	<p>Provide Pairing Detail Report for all 12 months. Obtain these from "FlightOps/CrewApp/schedView".</p> <p>Comments:</p>
<b>US AIRWAYS</b>	<p>Provide Trip Pairings for all trips during the year showing the layover city codes.</p> <p>Comments:</p>
<b>UNITED</b>	<p>Flight schedule data will only be accepted electronically via the Pilot-Tax App...saves time and paper! Download the Pilot-Tax App for your Droid phone, or go directly to our website at <a href="http://www.pilot-tax.com">www.pilot-tax.com</a> under START THE PROCESS go to GET SCHEDULES and select your airline. From either place you will be able to securely sign in to our app which will extract your "Crew Pay Registers" or your "Annual Per Diem Letter" and send to us directly. If you don't have a Droid or can't access thru our website, give us a call and we can help.</p> <p>Was the Pilot-Tax App used to send your schedules? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Comments:</p>
<b>COMPASS, FREEDOM, FRONTIER, GO-JET, JETBLUE, MESA, REPUBLIC, SHUTTLE AMERICA, SPIRIT, TRANS STATES, VIRGIN AMERICA</b>	<p>Provide "Schedule Detail Report" for all 12 months. These can be printed from Sabre CrewTrac; be sure to print each month individually to get the correct detail.</p> <p>If you prefer to utilize Flightline Services, you must contact them directly at 800-659-9859 or <a href="http://www.flightline.com">www.flightline.com</a> to order your Expense Report and Flight Log. Submit all pages of both reports with your tax documents. <b>Flightline does not make these reports available to you until mid February at the earliest.</b> Not available for Freedom Airlines.</p> <p>Comments:</p>

Base: \_\_\_\_\_ Airline: \_\_\_\_\_ Name: \_\_\_\_\_

January	February	March	April	May	June	July	August	September	October	November	December
1	1	1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5	5	5	5	5
6	6	6	6	6	6	6	6	6	6	6	6
7	7	7	7	7	7	7	7	7	7	7	7
8	8	8	8	8	8	8	8	8	8	8	8
9	9	9	9	9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11	11	11	11	11
12	12	12	12	12	12	12	12	12	12	12	12
13	13	13	13	13	13	13	13	13	13	13	13
14	14	14	14	14	14	14	14	14	14	14	14
15	15	15	15	15	15	15	15	15	15	15	15
16	16	16	16	16	16	16	16	16	16	16	16
17	17	17	17	17	17	17	17	17	17	17	17
18	18	18	18	18	18	18	18	18	18	18	18
19	19	19	19	19	19	19	19	19	19	19	19
20	20	20	20	20	20	20	20	20	20	20	20
21	21	21	21	21	21	21	21	21	21	21	21
22	22	22	22	22	22	22	22	22	22	22	22
23	23	23	23	23	23	23	23	23	23	23	23
24	24	24	24	24	24	24	24	24	24	24	24
25	25	25	25	25	25	25	25	25	25	25	25
26	26	26	26	26	26	26	26	26	26	26	26
27	27	27	27	27	27	27	27	27	27	27	27
28	28	28	28	28	28	28	28	28	28	28	28
29	29	29	29	29	29	29	29	29	29	29	29
30		30	30	30	30	30	30	30	30	30	30
31		31		31		31		31		31	

**Only complete this schedule if you do not have your actual monthly schedules.**  
 We have made this schedule easier for you to complete—we only need your layover cities entered on the day of each layover. When your trip has ended, write HOME on the day you returned to base. See the example at right.

Base: **JFK** Airline: **US AIRWAYS** Name: **JA**

January	February	March	April	May	June	July
1	1	1	1	1	1	1
2 LAX	2	2 SFO	2 HOU	2	2	2 HOME
3 HOU	3 MXP	3 DFW	3 HOME	3	3 MXP	3
	4 MYD	4 ORD	4	4 SFO	4 MXP	4 NRT

**Transfer Schedule from Log Book**

