

## Filling In Your 2014 Tax Organizer With Adobe Acrobat

- 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

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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

Button

Select Object

Forms

Recognize Text

Protection

Sign & Certify

Typewriter

10

Change font size

Personal Information 3

Taxpayer: trial  
First Name and Initial

version  
Last Name

On File  
Social Security Number

Occupation

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

Date of Death (Mo/Da/Yr)

Spouse: Sheldon  
First Name and Initial

Peabody  
Last Name

Social Security Number

Occupation

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  
X

Is the taxpayer claimed as a dependent on someone else's tax return? Yes No

Taxpayer Spouse

Yes No Yes No

Are you considered legally blind per IRS regulations? Yes No

Do you want to contribute to the Presidential Election Campaign Fund? Yes No