

Instructions: Print out this organizer, then complete it and bring it to our office at your scheduled tax appointment.

Tax Organizer for

(Year)

Taxpayer's Name _____

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Tax Organizer for _____ (year)

Please complete this organizer and bring it to your tax appointment. Your last year's tax return is an excellent guide for completing this organizer. Make a special note wherever you have additional information not on last year's return.

Personal Information

Taxpayer

Name _____
Social Security Number _____
Date of Birth _____
Occupation _____

Spouse

Name _____
Social Security Number _____
Date of Birth _____
Occupation _____

Mailing Address _____
City _____ State _____ Zip _____
Work Phone _____ Home Phone _____

| | Taxpayer | | Spouse | | Marital Status | |
|----------|--------------------------|--------------------------|--------------------------|--------------------------|----------------|--------------------------|
| | Yes | No | Yes | No | | |
| Blind | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Married | <input type="checkbox"/> |
| Disabled | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Single | <input type="checkbox"/> |
| | | | | | Widow(er) | <input type="checkbox"/> |

Filing Jointly Yes ☐ No ☐

Do you want to contribute \$3 to the Presidential Campaign Fund Yes ☐ No ☐

Dependent Children (others)

| Name | Social Security Number | Date of Birth | Relationship | Dependent's Income |
|------|------------------------|---------------|--------------|--------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Please bring the following to your appointment:

Last year's tax return, unless we prepared it.

Copies of all W-2s, 1099s, supporting documents of income and expense.

The mailing label given to you on the IRS tax booklet, if any.

Please answer the following questions:

| | | | | |
|------------------------------------------------------------|-----|--------------------------|----|--------------------------|
| Did you receive any notices from the IRS this past year? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Do you have a foreign bank account? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Did you pay to attend classes beyond high school? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Did you pay interest on a student loan this past year? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Did you receive any rental income from property? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Did you receive any farm income? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Do you have self-employment income or expense? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| Were there any births, adoptions, or deaths in the family? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |

Income

Wages (attach W-2s)

Name of Employer

Taxpayer

Spouse

Interest Income (attach 1099-INT)

Payor (bank, etc.)

Amount

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Dividends (attach 1099-Div)

Payor (company name)

Ordinary Div.

Capital Gain

Nontaxable

| | | | |
|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Partnership, S-Corp., and Other Income (attach K-1)

List the sources

Real Estate Sold (home, vacation property, bare land, etc.)

| Description | Selling Price | Date Purchased | Cost |
|-------------|---------------|----------------|------|
| | | | |
| | | | |
| | | | |

Investments Sold (stocks, bonds, mutual funds, other)

| Name | Cost | Date Acquired | Date Sold | Selling Price |
|------|------|---------------|-----------|---------------|
| | | | | |
| | | | | |
| | | | | |

Individual Retirement Account (IRA)

| Contributions for this past year | Amount | Roth | Regular |
|----------------------------------|--------|------|---------|
| Taxpayer | | | |
| Spouse | | | |

Withdrawals from IRA (attach 1099-R)

Reason for withdrawals:

Other Pension or Annuity Income (attach 1099-R)

| Payor | Reason for withdrawal |
|-------|-----------------------|
| | |
| | |
| | |
| | |

Other Income

| Source | Amount |
|-------------------------------------|--------|
| State income tax refund | |
| Commissions | |
| Unreported tips | |
| Installment sales payments received | |
| Alimony received | |
| Scholarships or grants | |
| Unemployment compensation | |
| Worker's compensation | |
| Disability income | |
| Other _____ | |

Expenses

Medical Expense (insurance, drugs, equipment, nursing, hospital, doctors, etc.)

| List type: | Amount |
|------------|--------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Taxes Paid (other than on W-2 wage statements)

| Type of tax | Amount |
|---------------------------------------------|--------|
| Federal income tax estimates (Form 1040-ES) | _____ |
| State income tax | _____ |
| Real estate tax | _____ |
| Personal property tax | _____ |
| Other _____ | _____ |

Interest Paid

| | Amount |
|------------------------------------|--------|
| Mortgage paid to: _____ | _____ |
| Investment interest paid to: _____ | _____ |

Child or Other Dependent Care Expenses

Did you pay for dependent care this past year? Yes ☐ No ☐

Details: (Care provider, social security number, amount)

Casualty or Theft Loss

Did you have property stolen or damaged by storm, water, fire, or accident this past year?

Yes ☐ No ☐

Details: _____

Charitable Contributions

Paid by cash (check)

| Organization: | Amount |
|---------------|--------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Moving Expenses (job related)

Did you move this past year due to change in job locations?

Yes ☐ No ☐

Details: _____

Employment Related Expenses (not reimbursed)

Did you buy tools, uniforms, licenses, or pay dues or educational expenses in relation to your work this past year?

Yes ☐ No ☐

Details: _____

Investment Expenses

| Item | Amount |
|--------------------------|--------|
| Investment interest paid | _____ |
| Safe deposit box rent | _____ |
| Tax preparation fee | _____ |
| Other _____ | _____ |