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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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**

TaxpayerNameSocial Security NumberDate of BirthOccupation				
Spouse Name Social Security Number Date of Birth Occupation				
Mailing Address City		Stat	e 7ir	
Work Phone		Home Phone	د کار ک	)
TaxpayerYesNoBlind	Spouse Yes	No	Marital Sta Married Single Widow(er)	
Filing Jointly Yes No				
Do you want to contribute \$3	to the Presidential G	Campaign Fun	d Yes No	
Dependent Children (other	5)			
Name	Social Security Number	Date of Birth	Relationship	Dependent's Income

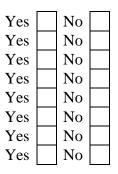
Please bring the following to your appointment:

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:

6 1
Did you receive any notices from the IRS this past year?
Do you have a foreign bank account?
Did you pay to attend classes beyond high school?
Did you pay interest on a student loan this past year?
Did you receive any rental income from property?
Did you receive any farm income?
Do you have self-employment income or expense?
Were there any births, adoptions, or deaths in the family?



Amount

# Income

# Wages (attach W-2s)

Name of Employer Taxpayer Spouse

#### Interest Income (attach 1099-INT)

Payor (bank, etc.)

#### **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 Federal income tax estimates (Form 1040-ES) State income tax Real estate tax Personal property tax Other	Amount
Interest Paid	Amount
Mortgage paid to:	
Child or Other Dependent Care Expenses Did you pay for dependent care this past year? Yes N Details: (Care provider, social security number, amount)	Io 🗌
Casualty or Theft Loss Did you have property stolen or damaged by storm, water, yes No Details:	fire, or accident this past year?
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	