

TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name:		Last name:	
First name:		First name:	
Middle Initial:		Middle Initial:	
Social security no.:		Social security no.:	
Date of Birth:		Date of Birth:	
Occupation:		Occupation:	
Work phone:		Work phone:	
Cell phone:		Cell phone:	
Email address:		Email address:	
Address:		Apt.	
City	State:	Zip:	
Home phone:		Fax number:	

Dependent Information					
First name	MI	Social Security No.	Date of Birth	Months lived with taxpayer	Child Case Expense
Last name	Suffix	Relationship			

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees				
Student First Name	MI	Suffix	Student Last Name	Social Security No.

Attach all Form 1098-Ts and list of your qualified education expenses.

Student Loan Interest Paid	
Enter total qualified student loan interest	

Income

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation	
Employer Name	Previous Year Amount

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc	
1099-R Payer Name	Previous Year Amount

Attach Form(s) SSA – 1099 – Social Security/Railroad Benefits	Taxpayer	Spouse
Social Security Benefits from Form SSA - 1099		
Railroad Retirement Benefits from Form RRB - 1099		
Medicare B premiums withheld		
Medicare D premiums withheld		

Attach Form(s) 1099-MISC – Miscellaneous Income	
1099-MISC Payer Name	

Attach Form(s) 1099-INT – Interest Income	
1099-INT Payer Name	Previous Year Amount

Attach Form(s) 1099-DIV – Dividend Income	
1099-DIV Payer Name	Previous Year Amount

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc
 Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:
 Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:
 Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contribution	Taxpayer	Spouse
Traditional IRA contributions made for this year		
Roth IRA contributions made for this year		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

Medical and Dental Expenses	This Year Amount	Previous Year Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc.		
Hospitals, clinics, etc.		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses		

Taxes	This Year Amount	Previous Year Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses
Home mortgage interest paid – Attach Form(s) 1098.

Lender's Name	This Year Amount	Previous Year Amount
Points paid on loan to buy, build or improve main home		

Lender's Name	This Year Amount	Previous Year Amount

Cash/ Check/ Credit Contributions	This Year Amount	Previous Year Amount

Noncash Charitable Contributions
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.

Miscellaneous Deductions	This Year Amount	Previous Year Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		