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Since 1985 • Enrolled Agent

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Individual Income Tax Organizer

1. Basic information, wages, interest & dividends
2. Stock sales and other income
3. Itemized deductions, child care & estimated tax payments
4. Business use of vehicles; income from corporations, partnerships and trusts
5. Business income and expenses
6. Rental income and expenses
7. General questions

TAX ORGANIZER

Basic Taxpayer Information

	First Name & Initial	Last Name	Social Security No.
Taxpayer			
Spouse			

	Occupation	Age on 12/31	65 or Over	Blind	Check if Dependent of Another	Presidential Election Contrib.
Taxpayer						
Spouse						

Street Address		Phone Res:	
City, State & Zip		Phone Work:	

Filing Status 1 - Single; 2 - Married filing joint; 3 - Married filing separate; 4 - Head of Household; 5 - Qualifying Widower

Dependent Information

	Name (first, initial, and last name)	Date of Birth	Social Sec. No.	Relation-ship	Months in home
1					
2					
3					
4					
5					
6					

Wages and Salaries

	Employer Name	Wages	Federal Tax Withheld	FICA Withheld	Medicare Withheld	State Tax Withheld	Local Tax Withheld
1							
2							
3							
4							
5							
6							

Interest Income

	Source	Amount
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		

Dividend Income

	Source	Amount
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		

Gains or Losses from Sales of Stocks, Securities and Other Capital Assets

	Kind of Property and Description	Date acquired mm/dd/yy	Date sold mm/dd/yy	Sales Price	Cost or other basis
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Other Income

	Prior Year Amount	Current Year Taxpayer	Current Year Spouse
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Adjustments to Income

	Prior Year Amount	Current Year Amount
1		
2		
3		
4		
5		
6		

Itemized Deductions

		Prior Year Amount	Current Year Amount
1	Medical and dental expenses		
2	Real estate taxes		
3	Personal property taxes		
4	Other taxes		
5	Home mortgage interest and points reported on Form 1098		
6	Home mortgage interest not reported on Form 1098 Name: _____ Address: _____ SSN: _____		
7	Home mortgage points not reported on Form 1099		
8	Investment interest paid		
9	Gifts to charity by cash or check		
10	Gifts to charity other than by cash or check		
11	Mileage driven to charitable activities		
12	Casualty and theft losses - Form 4684		
13	Unreimbursed employee expenses		
	Travel expenses (exclude meals)		
	Meals and entertainment		
	Parking and tolls		
	Telephone used for employer's business (allocate cost)		
	Professional organization or union dues		
	Educational expenses required to maintain your job		
	Office in home required by employer		
	Tools and equipment		
	Safety and protective clothing		
	Uniform costs		
	Professional journals subscriptions		
	Job seeking costs		
	Other		
14	Other expenses		
	Investment expenses		
	Tax preparation fees		
	Safe deposit box rental		
	Other		
15	Other miscellaneous deductions		

Child or Dependent Care Expenses

	Name	Paid To Address	Social Security or ID Number	Amount Paid
1				
2				
3				
4				

Estimated Taxes and Other Taxes Paid

	Date Due	Federal		State	
		Date Paid	Amount	Date Paid	Amount
1	Applied From Prior Year's Refund				
2	First Quarter Estimated Tax	April			
3	Second Quarter Estimated Tax	June			
4	Third Quarter Estimated Tax	Sept.			
5	Fourth Quarter Estimated Tax	This Jan.			
6	Other Tax Payments				
7	Prior year's state fourth quarter estimated tax payment (paid in current tax year)				
8	Prior year's state tax payment paid with extension/return				

Vehicle Information and Expenses

	Vehicle One	Vehicle Two
1 Description of vehicle		
2 Is the vehicle used in a business or by an employee?		
3 Cost (including sales tax)		
4 Date placed in service		
5 Business miles		
6 Commuting miles (daily commuting miles times the number of trips to work)		
7 Other personal use miles		
8 Total miles driven		
9 Gas and oil expenses		
10 Repairs and maintenance		
11 Auto insurance		
12 Registration, licenses, and fees		
13 Other auto expenses (identify)		
14 Auto rentals		

Auto Mileage Documentation

	Yes	No
1 Is another car available for personal use?		
2 Do you have evidence to support your mileage information reported above?		
3 If "Yes," is the evidence written in a log or other place?		

Income or Loss from S Corporations

	Name	Income	Loss	Other Expenses	Passive (Yes / No)
1					
2					
3					
4					
5					
6					

Income or Loss from Partnerships

	Name	Income	Loss	Other Expenses	Passive (Yes / No)
1					
2					
3					
4					
5					
6					
7					
8					

Income or Loss from Trust

	Name	Income	Loss	Other Expenses	Passive (Yes / No)
1					
2					
3					
4					
5					
6					

Self Employed Business Income and Expenses

1	Name of business (A) _____ Address of business (A) _____				
2	Name of business (B) _____ Address of business (B) _____				
		Business A		Business B	
		Prior Year	Current Year	Prior Year	Current Year
4	Gross receipts or sales				
5	Returns and allowances				
6	Inventory at beginning of year				
7	Cost of merchandise purchased				
8	Cost of labor				
9	Materials and supplies				
10	Other costs				
11	Inventory at end of year				
12	Advertising				
13	Bad debts from sales or services				
14	Car and truck expenses				
15	Commissions and fees				
16	Depletion				
17	Depreciation				
18	Employee benefit programs				
19	Insurance (not health)				
20	Mortgage interest				
21	Other interest				
22	Legal and professional services				
23	Office expense				
24	Pension and profit-sharing plans				
25	Rent or lease: machinery/equipment				
26	Rent or lease: other business property				
27	Repairs and maintenance				
28	Supplies				
29	Taxes and licenses				
30	Travel				
31	Meals and entertainment				
32	Utilities				
33	Wages				
34	Other: _____				
35	New equipment purchases (Description, date purchased, etc.):				

Income or Loss from Rentals and Royalties

A	Address of Property A	_____					
B	Address of Property B	_____					
C	Address of Property C	_____					
		Property A		Property B		Property C	
		Prior Year	Current Year	Prior Year	Current Year	Prior Year	Current Year
1	Was property used for personal purposes for more than the greater of 14 days or 10% of the total days rented at fair rental value?		Yes or No		Yes or No		Yes or No
2	Total rents received						
3	Total royalties received						
4	Advertising expenses						
5	Auto and travel						
6	Cleaning & maintenance						
7	Commissions						
8	Insurance						
9	Legal & professional fees						
10	Management fees						
11	Mortgage interest paid						
12	Other interest						
13	Repairs (list below)						
14	Supplies						
15	Taxes						
16	Utilities						
17	Other:						
18	New equipment & improvements (description, cost and date):						

General Questions

Please check if "Yes" and provide documentation, if possible.

- 1. Did your marital status change?
- 2. Were you notified by the IRS of changes to a prior year's return?
- 3. Are you being claimed as a dependent by another person?
- 4. Were there any changes in dependent information from the prior year?
- 5. Did you have any children under the age of 14 who received more than \$1,500 in investment income?
- 6. Do you have dependents who are neither U.S. citizens nor U.S. residents?
- 7. Did you provide over half of the support for another person (or persons) during the year?
- 8. Did you sell or purchase a principal residence?
- 9. Did you receive payments from a pension or profit sharing plan?
- 10. Did you receive any distributions from an IRA or other qualified plan?
- 11. Did you receive any disability income?
- 12. Did you receive any foreign income or pay any foreign taxes?
- 13. Did you receive interest from a bank account or other financial account based in a foreign country?
- 14. Were you the grantor of or transferor to a foreign trust?
- 15. Did you pay nondeductible dues to an association that was involved in political lobbying?
- 16. If you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?
- 17. Did you incur any non-business bad debts?
- 18. Did you receive proceeds from an installment sale made to relatives?
- 19. Did you make a loan at an interest rate below market rate?
- 20. Did you make gifts of over \$10,000 to an individual?
- 21. Were there any changes to a prior year's income, deductions, or credits that would require filing an amended return?
- 22. Did your employer pay premiums on life insurance in excess of \$50,000?

Business and Investment Questions

- 1. Did receive stock from a stock bonus plan with your employer?
- 2. Did you buy or sell any bonds?
- 3. Did you surrender any U.S. savings bonds?
- 4. Did you suffer a casualty, theft or condemnation?
- 5. Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S-corporations?
- 6. Did you own any investments for which you were not personally "at-risk?"
- 7. Did you own any interest in a Real Estate Mortgage Investment Conduit (REMIC)?
- 8. Did you sell any property or equipment on installment?
- 9. Did you incur any business-related educational expenses?
- 10. Did you incur any travel and entertainment expenses?
- 11. Did you purchase any special fuels for non-highway use?
- 12. Did you own a diesel-powered vehicle?