

INDIVIDUAL TAX ORGANIZER

Name	Soc. Sec. No.	DOB	Occupation	Work Phone
Taxpayer				
Spouse				
Street Address	City	State	ZIP	Home Phone
Email Address				

Taxpayer

Spouse

Filing Status (as of DECEMBER 31ST OF YEAR FILING)

Blind	Married	Will file jointly	Yes	No
Disabled	Legally Separated, Date of Separation	_____		
Pres. Campaign Fund	Single	_____		
Health Coverage	Widow(er), Date of Spouse's Death	_____		
	Head of Household			

Name (First, Last)	Relationship	Date of Birth	Social Security Number	Months Lived W/You	Disabled	FT Student	Dependent's Gross Income

Needed Documents

Employed

☐ Forms W-2 / 1099-Misc

Unemployed

☐ Unemployment, state tax refund (1099-G)

Self-Employed (See Small Business Tax Organizer)

- ☐ Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- ☐ Records of all expenses
- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Home office information, if applicable
- ☐ Record of estimated tax payments made (Form 1040ES)

Rental Income

- ☐ Records of income and expenses
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation Record of estimated tax payments made (Form 1040ES)

Retirement Income

- ☐ Pension/IRA/annuity income (1099-R)
- ☐ Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
- ☐ Social security/RRB income (1099-SSA, RRB-1099)

* Also bring your mileage log for business, personal and medical if applicable

Savings & Investments or Dividends

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- ☐ Record of estimated tax payments made (Form 1040ES)

Types Of Deductions

Home Ownership

- ☐ Forms 1098 or other mortgage interest statements
- ☐ Real estate and personal property tax records
- ☐ Receipts for energy-saving home improvements
- ☐ All other 1098 series forms

Charitable Donations

- ☐ Cash amounts donated to houses of worship, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts of miles driven for charitable or medical purposes

Medical Expenses

- ☐ Amounts paid for healthcare insurance and to doctors, dentists, hospitals

Health Insurance

- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- ☐ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
- ☐ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)

Childcare Expenses

- ☐ Fees paid to a licensed day care center or family day care for care of an infant or preschooler.
- ☐ Wages paid to a baby-sitter
- ☐ Don't include expenses paid through a flexible spending account at work

Other Income & Losses

- ☐ Gambling income (W-2G or records showing income, as well as expense records)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Trusts
- ☐ Royalty Income 1099 Misc.
- ☐ Any other 1099s received
- ☐ Record of alimony paid/received with Ex-spouse's name and SSN

Educational Expenses

- ☐ Forms 1098-T from educational institutions
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest

Job Expenses & Tax Prep Fees

- ☐ Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
- ☐ Receipts for classroom expenses (for educators in grades K-12)
- ☐ Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- ☐ Job-hunting expenses
- ☐ Record of moving expenses not reimbursed by employer
- ☐ Amount paid for preparation of last year's tax return

State & Local Taxes or Sales Tax

- ☐ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ☐ Invoice showing amount of vehicle sales tax paid

Retirement & Other Savings

- ☐ Form 5498-SA showing HSA contributions
- ☐ Form 5498 showing IRA contributions
- ☐ All other 5498 series forms (5498-QA, 5498-ESA)