

PERSONAL TAX ORGANIZER

Questions? Need Appointment? Call: 801-796-5937



Name:	SSN#
Spouse:	SSN#
Address:	email:

Did you have long distance phone service between Feb. 2003 - Aug. 2006? Yes/No

DEPENDENTS

Name	Relationship	SSN#	Year Born

INCOME

- Bring all copies of W-2 forms and 1099R forms
- Interest and Dividends from all sources (1099Div Forms)
- Social Security - Bring Form SSA 1099
- Sales from stocks and Mutual Funds (Name, # of Shares, Date Purchased/Cost, Date Sold/Amt)
- Misc. Income such as awards, gambling proceeds, jury pay, etc.

DEDUCTIONS

TAXES	Scouts	JOB EXPENSE
Boat, trailer, etc.	PTA/School	Auto/Mileage
Real Estate	Other	Dues
Vehicle	Milage	Education
INTEREST	MEDICAL	Job Seeking
Home Mortgage	Dentists	Meals/Entertainment
Equity-Line/2nd	Doctors	Phone/Cell
Points	Glasses/Contact	Travel
DONATIONS	Hospitals	Tools/Supplies
Non cash - DI, etc	Insurance	Uniforms
Cash: Church	Milage	
United Way, etc.	Prescriptions	

CHILD CARE EXPENSE

Each provider's Name, Address, Social Security # (or Tax ID), and amount paid.

COLLEGE TUITION CREDIT

Must be self or dependent.

Provide Name, and amount paid for tuition, books and class fees..

