

# INCOME TAX ORGANIZER



NAME \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_

SPOUSE \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_

ADDRESS: \_\_\_\_\_ E-MAIL \_\_\_\_\_

Did you receive a rebate check from the IRS last fall? Amount \_\_\_\_\_

### DEPENDENTS

Name	Relationship	Social Security#	Birth year

### 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	
Real Estate		PTA/School		Tools/Supplies	
Vehicle		Other		Dues	
Boat, trailer, etc		Miles		Uniforms	
INTEREST		MEDICAL		Job seeking	
Home mortgage		Insurance		Phone/cell	
Equity-line / 2nd		Doctors		Meals/entertain	
Points		Dentists		Travel	
DONATIONS		Hospitals		Educational	
Non cash -DI,etc		Prescriptions		Auto/mileage	
Cash: Church		Glasses/Contact			
United Way,etc		Miles			

### CHID 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..