

Personal Income Tax Organizer

(*Note:* If you have self-employment income, you will need to complete the **Sole Proprietor / Self-employed Income and Expenses**)

What to bring to the tax meeting:

- W2 and 1099 forms from work
- 1098 and 1099 forms from interest, dividends/stock or other investments
- Certificate of rents paid
- Real estate papers if you purchased or sold property
- Last years income taxes, if we did not prepare them
- Activities on IRA or SEP accounts
- Any paperwork from donations
- Social security numbers for everyone on the return
- Moving expenses, if you moved or changed jobs
- Home, auto and business expenses
- Education expenses
- Work related expenses
- Real estate expenses: home office, taxes, maintenance
- Healthcare expenses
- If you have extensive stock sales, you must call us for a "Schedule D" form prior to your appointment.

Income

Income		Income	
Employment	Amount	Investment	Amount
W2	\$	1099	\$
W2	\$	1099	\$
W2	\$	1099	\$

Expenses

Expense		Amount	
Medical		Contributions	
Medical Insurance	\$	Contributions – Church	\$
Medicine & Drugs	\$	Contributions – Other	\$
Doctors & Hospital	\$	Other	\$
Medical Mileage	\$	Non-Cash	\$
Eyeglasses	\$	Miscellaneous	
Misc.	\$	Alimony	\$
Other	\$	Union Dues	\$
Taxes		Tax Return Prep.	\$
Property Taxes	\$	Professional Dues	\$
State Income Tax Prior Year	\$	Publications	\$
Estimated Payments	\$	Employment Agency	\$
Auto Licenses	\$	Education	\$
Interest	\$	Uniforms	\$
Home Mortgage	\$	Tools	\$
Point on Home Purchase	\$	Dependants Tuition & Books, etc.	\$

We do not need your receipts, just the summaries. You need to keep your receipts for three years.