

Tax Organizer - Individual Return

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INCOME

W2 - Wage and Tax Statements

ATTACH FORMS

1099-INT - Interest Income

ATTACH FORMS

1099-DIV - Dividends and Distributions

ATTACH FORMS

OTHER INCOME

| | |
|---------------------------|-----------------------------|
| State Tax Refund | \$ |
| Alimony | \$ |
| Unemployment Compensation | \$ |
| Social Security | \$ |
| Business Income | See Business Organizer List |
| Rental Income | See Rental Organizer List |

SALES AND EXCHANGES (i.e. Stocks, real estate, or other property)

ATTACH FORMS

ITEMIZED DEDUCTIONS

Deductions below must exceed \$12,000 (single), \$24,000 (married filing jointly) - EXCEPT FOR STATE

| Medical Expenses | | Miscellaneous Deductions (FOR STATE ONLY) | |
|-----------------------------|----|-------------------------------------------|----|
| Dentist | \$ | Dues | \$ |
| Doctor | \$ | Investment Expenses | \$ |
| Equipment | \$ | Job Education | \$ |
| Eyeglasses/Rx | \$ | Job Seeking | \$ |
| Medical Miles | \$ | Legal Fees | \$ |
| Taxes Paid | | Licenses | \$ |
| Federal Estimated Tax Q1 | \$ | Safety Equipement | \$ |
| Federal Estimated Tax Q2 | \$ | Subscriptions | \$ |
| Federal Estimated Tax Q3 | \$ | Supplies | \$ |
| Federal Estimated Tax Q4 | \$ | Tax Preparation Fee | \$ |
| State Estimated Tax | \$ | Tools | \$ |
| Real Estate Tax (residence) | \$ | Uniforms | \$ |
| Personal Property Taxes | \$ | Union Dues | \$ |
| DMV fees | \$ | Other | \$ |
| | | Gambling Losses | \$ |

| Interest Paid | |
|---------------------|----|
| Main Home | \$ |
| Second Home | \$ |
| Points | \$ |
| Equity Loan | \$ |
| Investment Interest | \$ |

| Charitable Contributions | |
|--------------------------|----|
| Cash | \$ |
| Noncash Contributions | \$ |

| Adjustments | |
|----------------------------------------------------------|----|
| Educator Expenses (maximum \$250 per person) | \$ |
| Health Savings Account Deduction (HSA) | \$ |
| IRA Deduction | \$ |
| Student Loan Interest Deduction | \$ |
| School Tuition and Fees (must have school documentation) | \$ |