Tax Organizer - Individual Return

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INCOME				
W2 - Wage and Tax Statements	1099-INT - Interest Income			
Employer's Name	Name of Issuer			
1)	1)			
2)	2)			
3)	3)			
4)	4)			
5)	5)			
6)	6)			
1099-DIV - Dividends and Distributions				
Name of Issuer				
1)				
2)				
3)				
4)				
5)				
6)				

OTHER INCOME			
State Tax Refund	\$		
Alimony	\$		
Unemployment Compensation	\$		
Social Security	\$		
Business Income	\$		
Rental Income	\$		

SALES AND EXCHANGES (i.e. Stocks, real estate, or other property)					
Description	Purchase Date	Cost/Basis	Sale Date	Sale Price	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	
		\$		\$	

ITEMIZED DEDUCTIONS				
Deductions below must exceed \$6,700) (single), \$12,600 (married filin	g jointly), \$6,300 (married filing separate), or	\$9,300 (head of household)	
Medical Expenses		Miscellaneous Deductions		
Dentist	\$	Dues	\$	
Doctor	\$	Investment Expenses	\$	
Equipment	\$	Job Education	\$	
Eyeglasses	\$	Job Seeking	\$	
Medical Miles	\$	Legal Fees	\$	
Taxes Paid		Licenses	\$	
State Estimated Tax	\$	Safety Equipment	\$	
Real Estate Tax (residence)	\$	Subscriptions	\$	
Personal Property Taxes	\$	Supplies	\$	
DMV fees	\$	Tax Preparation Fee	\$	
Interest Paid		Tools	\$	
Main Home	\$	Uniforms	\$	
Second Home	\$	Union Dues	\$	
Points	\$	Other	\$	
Equity Loan	\$	Gambling Losses	\$	
Investment Interest	\$		•	
Charitable Conti	ributions	1		
Cash	\$	7		
Noncash Contributions	\$	7		
Transfer IRA to charity?	YES/NO (circle)	1		

Adjustments	
Educator Expenses (maximum \$250 per person)	\$
Health Savings Account Deduction (HSA)	\$
IRA Deduction	\$
Student Loan Interest Deduction	\$
School Tuition and Fees	\$
Moving Expenses (job related, and at least a 50 mile increase in commuting time)	\$

ALL SUPPORTING DOCUMENTATION SHOULD BE BROUGHT WITH YOU TO YOUR APPOINTMENT