INDIVIDUAL TAX RETURN ORGANIZER



Careful completion of this form may save you money!

TAXPAYER INFORMATION				TAX YEAR:					
NAME(S) AND ADDRESS	TO BE USED (ON TAX R	ETURN:						
Name									
Street			City			State	Zip Code		-
County		School Di	strict			Home Phone			
YOU 🗹		-		SPO	OUSE S				
Social Security No.	2-2-1			Soc	ial Security No.				
Occupation				Occ	eupation				
Date of Birth	Business Phone			Dat	e of Birth	Bus	iness Phone		
DEPENDENT CHILDREN Name Soc. S		Yr. End Age	l Son/ Dtr.	OT:	HER DEPENDER	ENDENTS		Support	
				-					
					-		· · · · · · · · · · · · · · · · · · ·		
DURING THIS LAST TAX Y MARRIED ON DIVORCED ON	YEAR:				ING STATUS: bouse Died	□Single □ J		d of House w(er) with c	
BECAME LEGALLY BLIND ON		· · · · · · · · · · · · · · · · · · ·		-	MOVED TO				
BECAME DISABLED	<u>, </u>				MOVED FROM				
DEATH OF SPOUSE OCCURRED ON					BEGAN TO PAY ALIMON	TY ON	AMO	DUNT	
SOLD HOUSE ON					OPENED AN IRA ON		AMO	UNT	
CHILD & DEPENDENT CA	ARE CREDITS		of Birth	L	Relat	ionship	Person liv Months	ed with y	
			Made No.			Mark and a second			
Person or Organization Providing Care		Social Se	ecurity No./TIN		Relationship	Period From	of Care To	Amo	unt
			-						

INCOME

'-2 WAGE & SALARY INCOME Attach All YOU S SPOUSE	W-2 s Amount		INTEREST IN YOU S SPOU		Payer	Amount
Name City State						
		\dashv				
<u> </u>		\dashv				····
		_		W 10 10 10 10 10 10 10 10 10 10 10 10 10		****
THER INCOME YOU S SPOUSE	Amount					
ALIMONY RECEIVED				COME		***
PENSION AND ANNUITY			YOU S SPOU	ICOME Attach all 10 SE DJOINT	999's Payer	Amount
UNEMPLOYMENT COMPENSATION						
TAX REFUNDS (STATE & LOCAL)						
···				· · · · · · · · · · · · · · · · · · ·		
COMMISSIONS AND FEES						
TIPS AND GRATUITIES						
HOBBY/K-1						
i					1	
APITAL GAINS/LOSSES	S					
APITAL GAINS/LOSSES			late Sold	Durahasa Prica	Salara	wi a a
APITAL GAINS/LOSSES		Drchased	ate Sold	Purchase Price	Sale p	rice
APITAL GAINS/LOSSES				Purchase Price	Sale p	rice
APITAL GAINS/LOSSES				Purchase Price	Sale p	rice
APITAL GAINS/LOSSES				Purchase Price	Sale p	rice
APITAL GAINS/LOSSES				Purchase Price	Sale p	rice
APITAL GAINS/LOSSES				Purchase Price	Sale p	rice
APITAL GAINS/LOSSES ALES OF STOCK/SECURITIES of Shares Name of Company				Purchase Price	Sale p	rice
APITAL GAINS/LOSSES ALES OF STOCK/SECURITIES Name of Company ALES OF PERSONAL RESIDENCE	Pu	rchased		Purchase Price	Sale p	
APITAL GAINS/LOSSES ALES OF STOCK/SECURITIES Name of Company ALES OF PERSONAL RESIDENCE		rchased		Purchase Price	Sale p	Amount
APITAL GAINS/LOSSES ALES OF STOCK/SECURITIES Name of Company ALES OF PERSONAL RESIDENCE	Pu	rchased		Purchase Price	Sale p	
APITAL GAINS/LOSSES	Pu	rchased		Purchase Price	Sale p	
APITAL GAINS/LOSSES ALES OF STOCK/SECURITIES Name of Company ALES OF PERSONAL RESIDENCE	Pu	rchased		Purchase Price	Sale p	
APITAL GAINS/LOSSES ALES OF STOCK/SECURITIES Name of Company ALES OF PERSONAL RESIDENCE	Pu	rchased		Purchase Price	Sale p	
APITAL GAINS/LOSSES ALES OF STOCK/SECURITIES Name of Company ALES OF PERSONAL RESIDENCE	Pu	rchased		Purchase Price	Sale p	

DEDUCTIONS- MEDICAL INS/ME Insurance Carrier, Amount Actually Paid, Withhel		DEDUCTIONS- MEDICINE & DRUGS Total Mile	age Amount
module carrie, i modul rectally 1 drd, within	u nom ray	PRESCRIPTIONS	age Fundant
		PRESCRIPTION VITAMINS	
		NON-PRESCRIPTION DRUGS	
DEDUCTIONS- MEDICAL EXPEN Doctor, Dentist, Psychiatrist Tol	SES* Amt P al Mileage By Ye		Amt Pa eage By Yo
		EYEGLASSES/EXAM	
		ARTIFICIAL LIMBS/TEETH	
		HEARING AIDS/BATTERIES	
		LAB FEES/ TESTS	
		NURSING SERVICES/BOARD	
		AMBULANCE SERVICE	
	,	THERAPY, X-RAYS	
		CRUTCHES, OTHER EQUIPMENT	
		TREATMENT AT ALCOHOL/DRUG CENTER	
		PAYMENT FOR ACUPUNCTURE	
		BIRTH CONTROL SURGERY	
DEDUCTIONS - TAXES	Amour	DEDUCTIONS- MISCELLANEOUS	Amount
INCOME TAX (STATE, CITY, FOREIGN)		JOB SEEKING IN SAME BUSINESS/RESUMES	
REALESTATE		SAFETY SHOES, UNIFORMS - COST/CLEANING	
and the second s		DUES - UNION/PROFESSIONAL ASSOCIATIONS	
		PROFESSIONAL TEXTS, MAGAZINES, NEWSPAPERS	
PERSONAL PROPERTY TAX		TAX PREPARATION/COUNSEL	
CITY OCCUPATIONAL TAX		INVESTMENT EXPENSES/PUBLICATIONS	
STATE TRANSFER TAXES ON STOCK/BOND SALE		SAFE DEPOSIT BOX	
OTHER		PROPERTY/CAR DAMAGE, THEFT	
		OTHER	
DEDUCTIONS-INTEREST	Amour	DEDUCTIONS-CHARITABLE	
MORTGAGE INTEREST		CHURCH/SYNAGOGUE	
POINTS PAID TO ACQUIRE LOAN		UNITED WAY	
OTHER		CANCER/HEART/MARCH OF DIMES	
		OTHER	
		SCOUTS	
		OUT OF POCKET COSTS	

NON-CASH

EMPLOYEE EXPENSES

PEST CONTROL

TRASH REMOVAL/SUPPLIES

EMPLOTEE EXPENSES								
MOVING EXPENSES - if you Qualified	Amou	ınt					Amount	
HOUSE HUNTING TRIPS			SALI	ALES OR LEASE EXPENSES-OLD HOUSE				
MPORARY HOUSING NEAR NEW WORK		SALES OR LEASE EXPENSES-NEW HOUSE						
COST OF MOVING FURNITURE AND GOODS	COST OF MOVING FURNITURE AND GOODS			TRAVEL COSTS FOR FAMILY TO NEW HOUSE				
AIR FARES, TRAIN, CAR			отн	ER COSTS				
MEALS								
LODGING				REIMBURSED BY EMPLOYERS IN W-2				
EMPLOYEE BUSINESS EXPENSES	Amount			CAR EXPENSE	S used for employe benefit		Amount	
AIR FARE, TRAIN				GAS, OIL, LUBE				
TAXI, BUS, SUBWAY				REPAIRS/TIRES/ANTI-FR	EEZE			
MEALS				WASHING AND WAXING	·			
LODGING				LICENSES, FEES, STATE	AND LOCAL TAXES			
OFFICE SUPPLIES/POSTAGE				INSURANCE				
ENTERTAINMENT: HOME/OUT				PARKING, TOLLS				
GIFTS (UNDER \$25 TO ANY ONE PERSON)				GARAGE RENTAL				
OTHER				AUTO CLUB DUES				
EDUCATIONAL EXPENSE: TUTTION				TOTAL MILEAGE FOR BI	TOTAL MILEAGE FOR BUSINESS			
BOOKS/REGISTRATION FEE				TOTAL MILEAGE FOR YEAR				
NAME OF INSTITUTION				DESCRIPTION OF CAR				
REASON FOR STUDY				DATE PURCHASED COST		COST		
INVESTMENT REAL ESTA	ATE				.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			
RENTAL INCOME Type and Location (2 family, 3 family)			□If	vacation home, did you	use more than 14 days? Y		of Rent Received	
RENTAL EXPENSES		Amou	nt				Amount	
ADVERTISING/COMMISSIONS				REPAIR - FURNACE/SERV	ICE CONTRACT			
CARPENTRY				REPAIRS - PLUMBING, EL	ECTRICAL			
LAWN CARE				PAINTING/DECORATING				
SNOW REMOVAL				OTHER IMPROVEMENTS	,			
CLEANING/SUPPLIES				MAJOR IMPROVEMENTS	OVER \$300			
INSURANCE				NEW APPLIANCES				
TAXES - PROPERTY				NEW FIXTURES: PLUMBI	NG, ELECTRICAL			
INTEREST ON MORTGAGE				DEPRECIATION EXPENS	SES:			
FUEL AND ELECTRIC FOR TENANTS ONLY				COST OF HOUSE				
FUEL AND ELECTRIC - WHOLE HOUSE				DATEBOUGHT	LAND VALUE			

OTHER DEPRECIABLE ITEMS:

COST

DATE BOUGHT

BUSINESS NAME		EMPLOYER I.D.NO.		
BUSINESS ADDRESS				
MAIN BUSINESS ACTIVITY		PRODUCT		
NCOME				
GROSS RECEIPTS, SALES		RETURNS, ALLOWANCES		
		t.		
DEDUCTIONS-EQUIP./FURN. PURCHASE	S Amount		1	
ACCOUNTING, AUDITING, LEGAL		REPAIRS AND MAINTENANCE		
ADVERTISING, BUSINESS CARDS		TRAVEL EXPENSES		
BAD DEBTS	-	ENTERTAINMENT		
BANK SERVICE CHARGES		OUTSIDE CONTRACTOR/CONSULTANT		
CAR, TRUCK EXPENSES		TAXES		
COMMISSIONS		TELEPHONE		
DEPRECIATION AND AMORTIZATION		WAGES		
DUES AND PUBLICATIONS		LICENSES		
EMPLOYEE BENEFTI'S		OTHER		
FREIGHT				
INSURANCE				
INTEREST ON BUSINESS INDEBTEDNESS				
LAUNDRY - OFFICE CLEANING				
OFFICE SUPPLIES - POSTAGE				
RENT - EQUIPMENT, OFFICE SPACE				
DEDUCTIONS Description Purchase Date	Amount	OFFICE - IN HOME EXPENSES		
		UTILITIES		
		INSURANCE		
		REPAIRS - MAINTENANCE - WHOLE HOUSE		
		REPAIRS - MAINTENANCE - OFFICE ONLY		
		RENT		
		OTHER		
		CASUALTY LOSS		
		TOTAL SQ FEET, OR ROOMS IN HOUSE/APT.		
		SQ FEET OR ROOMS USED IN BUSINESS		
	 	EMPLOYEE □ DAY CARE CENTER □		

RECORDKEEPING:

All taxpayers are required to keep permanent and accurate records that clearly reflect income and deductions. These records must be kept for at least three years. Generally a cancelled check is an adequate record, but receipts should be obtained where possible. A daily diary might be useful in substantiating a deduction.

AREA USED REGULARLY, EXCLUSIVELY FOR BUSINESS?

YES

NO

ESTIMATED TAXES ALREADY P. Not Withheld by W-2's	AID	Federal	State	City	Other
	CREDIT FROM PRIOR YEARS				
ACTUAL CASE	I, CHECK PAYMENTS APRIL 15				-
	JUNE 15				
	SEPTEMBER 15				
	JANUARY 15				
ESTIMATED TAX FO ALL W-2'S AND 1099 PURCHASE AND CLI AGREEMENTS FOR S ALL CANCELLED CI LAST YEAR'S FEDER LAST FOUR YEARS	ID MAILING ENVELOPES SENT RMS SENT TO YOU S FOR INTEREST, DIVIDEND AN DSING AGREEMENTS FOR SALE SALE OF STOCK HICEKS, RECEIPTS, RECORDS YO RAL, STATE, AND CITY INCOME RETURNS IF LARGE INCREASE	TO YOU JO COMMISSION INCOME OF REAL ESTATE DU HAVE FOR ITEMS TAX RETURNS IN INCOME THIS YEAR R AITENTION AN ITE	LISTED NR M THAT YOU MIGHT H		RLOOKEDI
ALL OF THE ENCLOSED INFORM PREPARATION OF MY INCOME				IE FOR USE IN	THE
Signature	Date	Signatur	re		