

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 RETURN:

Name			
Street	City	State	Zip Code
County	School District	Home Phone	

YOU

Social Security No.	
Occupation	
Date of Birth	Business Phone

SPOUSE

Social Security No.	
Occupation	
Date of Birth	Business Phone

DEPENDENT CHILDREN

Name	Soc. Sec. #	Yr. End Age	Son/ Dtr.

OTHER DEPENDENTS

Name	% Support	All their Income

DURING THIS LAST TAX YEAR:

MARRIED ON
DIVORCED ON
BECAME LEGALLY BLIND ON
BECAME DISABLED
DEATH OF SPOUSE OCCURRED ON
SOLD HOUSE ON

FILING STATUS: Single Joint Head of Household Spouse Died Married, Filing Separate Qualifying Widow(er) with dep. child

BOUGHT HOUSE ON	
MOVED ON	
MOVED TO	
MOVED FROM	
BEGAN TO PAY ALIMONY ON	AMOUNT
OPENED AN IRA ON	AMOUNT

CHILD & DEPENDENT CARE CREDITS

Name of Dependent	Date of Birth	Relationship	Person lived with you	
			Months	Days

Person or Organization Providing Care	Social Security No./TIN	Relationship	Period of Care		Amount
			From	To	

INCOME

W-2 WAGE & SALARY INCOME Attach All W-2's

YOU SPOUSE Amount

Name	City	State	Amount

INTEREST INCOME Attach all 1099's

YOU SPOUSE JOINT Payer Amount

Payer	Amount

OTHER INCOME

YOU SPOUSE Amount

ALIMONY RECEIVED	
PENSION AND ANNUITY	
UNEMPLOYMENT COMPENSATION	
TAX REFUNDS (STATE & LOCAL)	
COMMISSIONS AND FEES	
TIPS AND GRATUITIES	
HOBBY/K-1	
OTHER	

DIVIDEND INCOME Attach all 1099's

YOU SPOUSE JOINT Payer Amount

Payer	Amount

CAPITAL GAINS/LOSSES

SALES OF STOCK/SECURITIES

No. of Shares Name of Company Purchased Date Sold Purchase Price Sale price

No. of Shares	Name of Company	Purchased	Date Sold	Purchase Price	Sale price

SALES OF PERSONAL RESIDENCE

Date Acquired Amount Amount

Date Acquired	Amount	Amount

EMPLOYEE EXPENSES

MOVING EXPENSES - if you Qualified

	Amount		Amount
HOUSE HUNTING TRIPS		SALES OR LEASE EXPENSES-OLD HOUSE	
TEMPORARY HOUSING NEAR NEW WORK		SALES OR LEASE EXPENSES-NEW HOUSE	
COST OF MOVING FURNITURE AND GOODS		TRAVEL COSTS FOR FAMILY TO NEW HOUSE	
AIR FARES, TRAIN, CAR		OTHER COSTS	
MEALS			
LODGING		REIMBURSED BY EMPLOYERS IN W-2	

EMPLOYEE BUSINESS EXPENSES

	Amount
AIR FARE, TRAIN	
TAXI, BUS, SUBWAY	
MEALS	
LODGING	
OFFICE SUPPLIES/POSTAGE	
ENTERTAINMENT: HOME/OUT	
GIFTS (UNDER \$25 TO ANY ONE PERSON)	
OTHER	
EDUCATIONAL EXPENSE: TUITION	
BOOKS/REGISTRATION FEE	
NAME OF INSTITUTION	
REASON FOR STUDY	

CAR EXPENSES used for employe benefit

	Amount
GAS, OIL, LUBE	
REPAIRS/TIRES/ANTI-FREEZE	
WASHING AND WAXING	
LICENSES, FEES, STATE AND LOCAL TAXES	
INSURANCE	
PARKING, TOLLS	
GARAGE RENTAL	
AUTO CLUB DUES	
TOTAL MILEAGE FOR BUSINESS	
TOTAL MILEAGE FOR YEAR	
DESCRIPTION OF CAR	
DATE PURCHASED	COST

INVESTMENT REAL ESTATE

RENTAL INCOME

Type and Location (2 family, 3 family)

If vacation home, did you use more than 14 days? YES / NO

% of Personal Use

Amount of Rent Received

Type and Location	% of Personal Use	Amount of Rent Received

RENTAL EXPENSES

	Amount		Amount
ADVERTISING/COMMISSIONS		REPAIR - FURNACE/SERVICE CONTRACT	
CARPENTRY		REPAIRS - PLUMBING, ELECTRICAL	
LAWN CARE		PAINTING/DECORATING	
SNOW REMOVAL		OTHER IMPROVEMENTS	
CLEANING/SUPPLIES		MAJOR IMPROVEMENTS OVER \$300	
INSURANCE		NEW APPLIANCES	
TAXES - PROPERTY		NEW FIXTURES: PLUMBING, ELECTRICAL	
INTEREST ON MORTGAGE		DEPRECIATION EXPENSES:	
FUEL AND ELECTRIC FOR TENANTS ONLY		COST OF HOUSE	
FUEL AND ELECTRIC - WHOLE HOUSE		DATE BOUGHT	LAND VALUE
PEST CONTROL		OTHER DEPRECIABLE ITEMS:	
TRASH REMOVAL/SUPPLIES		DATE BOUGHT	COST

ESTIMATED TAXES ALREADY PAID

Not Withheld by W-2's

	Federal	State	City	Other
CREDIT FROM PRIOR YEARS				
ACTUAL CASH, CHECK PAYMENTS APRIL 15				
JUNE 15				
SEPTEMBER 15				
JANUARY 15				

CHECKLIST OF ITEMS TO BRING OR SEND WITH THIS FORM:

- THE TAX FORMS AND MAILING ENVELOPES SENT TO YOU
- ESTIMATED TAX FORMS SENT TO YOU
- ALL W-2'S AND 1099'S FOR INTEREST, DIVIDEND AND COMMISSION INCOME
- PURCHASE AND CLOSING AGREEMENTS FOR SALE OF REAL ESTATE
- AGREEMENTS FOR SALE OF STOCK
- ALL CANCELLED CHECKS, RECEIPTS, RECORDS YOU HAVE FOR ITEMS LISTED
- LAST YEAR'S FEDERAL, STATE, AND CITY INCOME TAX RETURNS
- LAST FOUR YEARS RETURNS IF LARGE INCREASE IN INCOME THIS YEAR

REMINDER: CAREFUL READING OF THIS FORM MIGHT CALL TO YOUR ATTENTION AN ITEM THAT YOU MIGHT HAVE OTHERWISE OVERLOOKED!

NOTES AND QUESTIONS: USE THIS SPACE TO MAKE NOTES OR WRITE QUESTIONS YOU MIGHT WANT TO ASK.

ALL OF THE ENCLOSED INFORMATION IS CORRECT AND WAS FURNISHED BY ME FOR USE IN THE PREPARATION OF MY INCOME TAX RETURN FOR THIS YEAR ENDED.

Signature

Date

Signature

Date