**Income Tax Organizer**

\_\_\_ A copy of your last year’s taxes, if I did not prepare them.

\_\_ Names and social security numbers for everybody who has not previously been a dependent.

\_\_ Income documents (W-2, 1099-MISC, 1099-R).

\_\_ Investment documents for interest, dividends, and capital gains (1099-DIV, 1099-B, 1099-INT).

(If you sold any investments, I need the **COST BASIS** (what you paid for the investment)

\_\_\_ Mortgage Interest Statements from each mortgage, equity loan, or line of credit.

\_\_\_ If you purchased, sold, or re-financed a home, bring your closing package (or settlement statement).

\_\_\_ Property tax statements or Certificates of Rent Paid (CRP) for renters.

\_\_\_ Child Care Information- **Name, Address, SS# or EIN number of the provider and amount paid.**

\_\_\_College Expenses (tuition/books). **Tax Form 1098-T is required.** Be sure to have it.

\_\_\_ If Self-Employed, **complete Self-employment Organizer.**

**Deductions**

Property Taxes (primary home) \_\_\_\_\_\_\_\_\_

Property Taxes (second home) \_\_\_\_\_\_\_\_\_\_

Car Tabs \_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Quarter | Federal Payment | Date Paid | State Payment | Date Paid |
| 1st Quarter |  |  |  |  |
| 2nd Quarter |  |  |  |  |
| 3rd Quarter |  |  |  |  |
| 4th Quarter |  |  |  |  |

**Quarterly Estimated Payments**

**Charitable Contributions (Totals)**

Contributions of Money \_\_\_\_\_\_\_\_\_\_

Contribution of Goods (value) \_\_\_\_\_\_\_\_\_\_

**Medical Expenses (must exceed threshold)**

Prescriptions \_\_\_\_\_\_\_\_\_\_

Doctors/Dentist/Hospital \_\_\_\_\_\_\_\_\_

Other \_\_\_\_\_\_\_\_\_\_

Medical Mileage \_\_\_\_\_\_\_\_\_\_