



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 _____

Charitable Contributions (Totals)

Contributions of Money _____
 Contribution of Goods (value) _____

Quarterly Estimated Payments

Medical Expenses (must exceed threshold)

Prescriptions _____
 Doctors/Dentist/Hospital _____
 Other _____
 Medical Mileage _____

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