

INCOME TAX ORGANIZER & DEDUCTION FINDER

"We Find Deductions Others Miss!"

Your Name _____ Birthdate _____
 Spouse's Name _____ Birthdate _____
 Your Address _____
 City & Zip _____ Home Phone _____
 Work/ Cell Phone _____ Email _____

SPECIAL ATTENTION AREAS

Check Items to Discuss with Bill

- IRS Problems and Concerns
- Business Income and Expenses
- Member of Armed Forces
- Moving Expenses
- Out-of-Town Expenses
- Proactive Tax Planning**
- Rental Income and Expenses
- Retirement Income
- Sale of Stock and/or Property
- IRS New Home Credit Refund**
- _____

DEPENDENTS: Name Soc. Sec. No. Birthdate Relationship Income

THINGS TO BRING • Last Year's Returns • W2's, 1098s, 1099s • Closing Statements • Other Supporting Data

INCOME

Alimony Received . . . _____
 Commissions _____
 Lottery, Prizes _____
 Partnerships _____
 Pensions, Annuities. . . _____
 Royalties _____
 Self-Employment _____
 Social Security _____
 State Tax Refund _____
 Tips _____
 Trust and Estates _____
 Unemployment _____

INTEREST & DIV

CREDITS

Alimony Paid _____
 Early W/D Penalty _____
 IRA (You / Spouse) _____
Production Credit. _____
 Education ESA. _____
 Adoption Expenses. _____
 Tuition Expenses . . . _____

CHILD CARE

Amount Paid _____
To whom:
 Name, Address, ID #

MEDICAL

Batteries, Crutches, Etc. . . _____
 Doctors, Dentists, Labs . . . _____
 Drug/Alcohol Treatment. . . _____
 Glasses, Contacts, Exams . . . _____
 Guide Dog, Wheelchair . . . _____
 Health/Dental Insurance. . . _____
 Hearing Aids, Braces _____
 Hospitals, Nursing Care . . . _____
 Weight Loss Program _____
 Necessary Lodging _____
 School for Disabled _____
 Special Diets, Wigs _____
 Therapy, Acupuncture _____
 Prescriptions, Insulin _____
 Taxi, Ambulance _____
 Special Equipment _____
 Section 105 Medical Plans. _____
 Mileage for Medical Care . . . _____

MISCELLANEOUS

Educator Expenses. _____
 Energy Saving Purchases . . . _____
 Large Item Purchases _____
 Licenses, Bad Loans _____
 Looking for a New Job _____
 Office In Home Yes . . . _____
 Parking Fees, Tolls _____
 Physical Exams _____
 Safe Deposit Box _____
 Safety Equipment _____
 Student Loan Interest _____
 Supplies, Tools _____
 Tax Preparation _____
 Training, Seminars _____
 Travel to 2nd Job _____
 Uniforms and Care _____
 Union/Professional Dues. _____

TAXES

State Income Tax _____
REAL ESTATE TAX _____
NEW CAR SALES TAX. _____
 Tag Tax _____
 Fed Estimated Tax _____
 State Estimated Tax _____

INTEREST

Mortgage _____
 If paid to an individual
 Name _____
 Address _____
 2nd Mortgage _____
 Points Paid _____
 Mortgage Insurance Prem. _____
 Investment Interest Exp . . . _____

CONTRIBUTIONS

Cash, Check, Charge. _____
 Property Given (FMV) _____
Charitable Works:
 Mileage or Cost _____
 Out-of-Town Expenses _____
 Chaperon & Sponsor _____
 Supplies - Uniforms _____
Haiti Contributions . _____

AUTO EXPENSES

Auto Club Dues _____
 Gas, Oil, Lube _____
 Insurance _____
 INTEREST _____
 Lease Payments _____
 Licenses, Fees _____
 Rentals _____
 Repairs _____
 Tires - Accessories _____
 Washing and Waxing _____