



### Tax Organizer

Name	
Social Security Number	
Date of Birth	
Address	
Telephone Number	
Email Address	
Profession	

<b>Spouse's</b> Name	
Social Security Number	
Date of Birth	
Telephone Number	
Email Address	
Profession	

#### Dependent 1

#### Dependent 2

Name		Name	
SSN		SSN	
DOB		DOB	
Relationship to you		Relationship to you	
Day Care Paid		Day Care Paid	
Day Care Name		Day Care Name	
Day Care EIN		Day Care EIN	

#### Bank Information for Direct Deposit (or you can provide a voided check for the account)

Name of Bank:
Routing Number:
Account Number:



**Please provide the following applicable tax documents**

W2s (wage statement from employer)	1099-R (retirement income)
1099-Int (interest income)	1099-B (stock proceeds)
1099-Div (dividend income)	1099-Misc (self employment income)
1099-K (for credit card payments to you)	1099-G (unemployment income or state tax refunds)
SSA (social security income)	Alimony Payments Received
Gambling Income	Rental Income (see attached worksheet)
Business Income (see attached worksheet)	K-1s (statement from partnership, corporation or trust)
1098-T (tuition statement)	1098-E (student loan interest paid)
1098 Mortgage Interest Statement	Property Tax Statement
Receipts for Charitable Donations	Receipts for Political Contributions
Copy of 2012 Tax Returns (if new client)	Settlement statements for sale of home or other property

Health Insurance	\$	ROTH Contributions	\$
Medical Expenses	\$	SEP Contributions	\$
Tax Prep Fees	\$	IRA Contributions	\$
Educator Expenses	\$	Union Dues	\$
Alimony Paid	\$	Investment Expenses	\$

Additional Information:



### SELF EMPLOYMENT INFORMATION WORKSHEET

for contractors, small business owners or employees with unreimbursed expense

	If you have QuickBooks, please provide a copy of your QuickBooks company file and your December bank and cc statements
	If you have employees please provide a copy of the W2s you filed
	If you have independent contractors that work for you please provide copies of the 1099s you filed

Business Name	
Address	
EIN/SSN	

TOTAL INCOME (do not include W2 income)	\$
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#### EXPENSES

Advertising (business cards, website, print ads, etc)	\$
Bank Fees (merchant services and bank fees)	\$
Contract Labor (not employees) did you issue 1099s? Y N	\$
Dues & Subscriptions	\$
Insurance (liability, workers comp but NOT health)	\$
Insurance HEALTH	\$
Office Expenses (paper, pens etc)	\$
Repairs & Maintenance (computer, property etc)	\$
Rents or Lease	\$
Taxes & Licenses (employer payroll taxes, permits, etc)	\$
Utilities	\$
Wages	\$
Other	\$
	\$
	\$
	\$

continued...

**BUSINESS RELATED TRAVEL**

DATES	CITY/STATE	MEALS	TRANSPORTATION	LODGING	OTHER
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$
		\$	\$	\$	\$

**EQUIPMENT (computers, software, furniture, etc)**

Item	Date of Purchase	Cost	% for business
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

**BUSINESS USE OF HOME (for expenses, please list the total amount for the household for the year)**

Total sq footage of home		Square footage of office only	
Rents	\$	Insurance	\$
Utilities (gas, electric, trash, etc)	\$	Repairs & Maintenance	\$
Other	\$	Other	\$

**BUSINESS USE OF AUTOMOBILE**

Type of Vehicle	
Date Placed in Service	
Do you have another vehicle available for personal use?	
Was your vehicle available for use during off-duty hours?	
Do you have evidence to support your deduction?	
Is the evidence written? (mileage log etc)	
Commuting Miles (driving to and from work)	
Business Miles (meeting clients, overnight travel, etc)	
Other Miles (everything else - personal use)	
Parking and Tolls Paid	\$

**AUTO EXPENSES (for claiming actual expenses instead of mileage)**

Garage Rent	\$
Fuel	\$
Insurance	\$
Licenses & Registration	\$
Repairs & Maintenance	\$
Other Auto Expenses	\$

Other Business Information/Notes:



## RENTAL INFORMATION WORKSHEET

please use one worksheet per rental property

Property Address	
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Do you live in the home you rented?		If yes - what % of the home did you rent?	
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Rental Income	\$
Advertising	\$
Cleaning & Maintenance	\$
Commissions	\$
Insurance	\$
Management Fees	\$
Mortgage Interest (please include a copy of the 1098)	\$
Repairs & Maintenance	\$
Supplies	\$
Taxes	\$
Other:	\$
Other:	\$

Other Information/Notes:
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