

### INDIVIDUAL INCOME TAX ORGANIZER

Taxpayer's Name (First, Middle and Last)		US Citizen(Y/N)		Social Security Number	
Spouse's Name		US Citizen(Y/N)		Social Security Number	
Taxpayer's Occupation If Student -list credits and Semester attended -Spring(Summer)/Fall 15 Credits				Birth Date (mm,dd,yyyy)	Blind?
Spouse's Occupation If Student -list credits and Semester attended -Spring(Summer)/Fall 15 Credits				Birth Date (mm,dd,yyyy)	Blind ?
Address( If more than One Address list all addresses lived in Calendar 2012 (by date on back of form)					
City	State	Zip	Home Phone	Work Phone	
E-Mail Address					

**Dependent Children (who lived with you) Need to know dates if lived under 12 months (add backside)**

1) Name (First/Middle/Last)	Social Security #	Birth Date	3) Name	Social Security #	Birth Date
2) Name	Social Security #	Birth Date	4) Name	Social Security #	Birth Date

**Other Dependents (Need dates lived with you and if disabled -student -plus Gross Income)-backside**

1) Name	Social Security #	Birth Date	Time at home	Relationship	Support by you %	Support by others
2) Name	Social Security #	Birth Date	Time at home	Relationship	Support by you %	Support by others

**Things to Bring (if applicable-tick box and add the Quantity and attach via PDF)**

- Last year's tax return (if new client)
- W-2 forms for wages (qty \_\_\_\_\_)
- All 1099 Retirement Statements & Forms
- 1099's for interest, dividends & other income
- K-1 from partnerships, corporations & estates
- 1099 SSA -Social Security benefit statements
- Property tax statements-Principal & (Include Secondary (Vacation Home-Timeshare etc.)
- CPR-MN Landlord -Certificate Rent Paid
- Education Receipts for books and Tuition (1098T and account statements)
- IRA & Roth IRA (**Annual Investment Statements**)
- 1098's Mortgage interest paid

- Forecloser papers of purchases & or sales Form 1099C or 1099 A
- Government Form 1099 G Refund 2011
- All other statements showing income
- Other Income including, gambling winnings, alimony received, prizes, tips, royalties, disability, work comp payments  
Optional form -Last Pay Stub
- Health Savings Account Statement- 1099
- HUD Statement for Home Purchase-Sale
- Information about **Foreign Bank Accounts & Assets**

Are you a U.S. Citizen, if not bring in your Visa -ITIN or Immigration forms Know # Days in US -last 3 Years-

**Rental/Self-Employment Income & Expenses**

Total Income Received(full year)	\$
Expenses: Property Taxes	\$
(need Receipts) Utilities	\$
Interest	\$
Insurance	\$
Repairs	\$
Supplies	\$
Equipment	\$
Advertising	\$
Other -List back side	\$

**Home Office Information**

<b>Subsidy from Employer (Y/N) \$</b>	
Office square footage	
House square footage	
Utilities Paid	\$
Insurance Paid	\$
Other	\$

**EITC Credit eligible (Form 8332)**

Any special issues-Children-Use back of form

*Sole Proprietorship (Can take QuickBooks -Peachtree Disk (Schedule C) Statements*

# Schedule A Deduction & Credit Items

## Adjustments

### IRA Contributions (1<sup>st</sup> Yr.) Yes or No(Circle One)

Taxpayer \$ \_\_\_\_\_ Traditional IRA or Roth IRA  
 Spouse \$ \_\_\_\_\_ Simple --SEP--Keogh  
 Date of Contributions (mm/dd/yyyy) \_\_\_\_\_

Penalty for early withdrawal	\$
Alimony paid Name SS#	\$
Self-Employed:(annual expense)	
Type F / S Medical Insurance	\$
Type F /S Dental/STD Insurance	\$
Health Saving (HSA)Contributions	\$
Employer Paid Education	\$

## Medical Expenses

Insurance Premium	\$
Long term care insurance	\$
Policy # _____ H or W-Both	
Prescriptions	\$
Eyeglasses	\$
Doctors	\$
Dentists	\$
Hospital	\$
Ambulance	\$
Hearing aid & batteries	\$
Other medical expenses	\$
Other travel expenses	\$
Medical miles: 1/1 to 6/30	
Medical Miles: 7/1 to 12/31	
Reimbursement	\$

## Taxes

Real Estate taxes	\$
Personnel Property taxes	\$
State Income taxes paid (prior year)	\$
<b>State estimates paid</b>	
Date _____ \$ _____	Date _____ \$ _____
Date _____ \$ _____	Date _____ \$ _____
<b>Federal estimates paid</b>	
Date _____ \$ _____	Date _____ \$ _____
Date _____ \$ _____	Date _____ \$ _____
Vehicle license tabs	\$
Make Model YR	

## Interest Expense

<b>Home mortgage (Paid to a Bank)</b>	
1 <sup>st</sup> mortgage	\$
2 <sup>nd</sup> mortgage	\$
Home equity	\$
Second home mortgage	\$
<b>Home mortgage (paid to an individual)(copy of Note)</b>	
Name, Address & SS/EIN of Issuer	

## Investment Interest

Margin account	\$
Other	\$

## Contributions ( Attach List )

Churches	\$
Other contributions of money	\$
Volunteer Expenses	\$
Charitable mileage	
Fair market value of property donated (detailed list if over \$500) receipts	\$
Other	\$

## Casualty & Theft Losses

For additional information, speak to your tax preparer

## Job Related Automobile Expenses

Total miles	
Business miles: 1/1 to 6/30	
Business miles: 7/1 to 12/31	
Commuting miles	
Personal miles	
Odometer reading 1/01	
Odometer reading 12/31	
Gas & oil	\$
Interest	\$
Tolls & local transportation	\$
Lease payments	\$
Parking	\$
Other	

## Investment & Job related Miscellaneous Deductions (

Dues & subscription	\$
Education	\$
Required for License(Y/N)	
Safety Equipment	\$
Uniforms	\$
Job seeking expense	\$
Legal/Accounting fees	\$
Tools & equipment	\$
Business entertainment	\$
Investment & tax advice	\$
Safe deposit box	\$
Hobby losses	\$
Investment fees	\$
Gambling losses	\$
Impairment related work cost	\$
Other	\$

## Child Care Expense

Name, address, ID# & amount paid for all providers  
 See IRS form 2441-Statement attached  Yes