

Individual Tax Organizer

Personal Information

You:

First name Last name Social Security Number

Date of Birth Occupation

Phone Number Email Address

Marital Status: Single Married Divorced Legally separated Widowed

Spouse:

First name Last name Social Security Number

Date of Birth Occupation

Phone Number Email Address

Mailing Address:

Address City State Zip code

Did your address change? Yes No Date changed

Dependents
Dependent 1:
First name Last name Social Security Number
Date of Birth Relationship
Income (if over \$4,400) Number of Months Resided in Home
Was a full-time college student? Yes No Did file his/her own return? Yes No
Dependent 2:
First name Last name Social Security Number
Date of Birth Relationship
Income (if over \$4,400) Number of Months Resided in Home
Was a full-time college student? Yes No Did file his/her own return? Yes No
Dependent 3:
First name Last name Social Security Number
Date of Birth Relationship
Income (if over \$4,400) Number of Months Resided in Home
Did file his/her own return? Yes No Was a full-time college student? Yes No
Dependent 4:
First name Last name Social Security Number
Date of Birth Relationship
Income (if over \$4,400) Number of Months Resided in Home
Did file his/her own return? Yes No Was a full-time college student? Yes No

Income Sources

Work Income

Had a Job (W-2)

Self-Employed (1099-NEC, 1099-MISC, 1099-K)

Investment & Savings

Brokerage Accounts (1099-B, Brokerage Statement)

Interest Income (1099-INT)

Dividend Income (1099-DIV)

Exercised Incentive Stock Options (Form 3921)

Sold Real Estate (1099-S)

Less Common Investment & Savings

Received 1099-OID

Undistributed Capital Gains (Form 2439)

Foreign Accounts

Retirement Plans and Social Security

IRA, 401k, Pension Plan Withdrawals (1099-R)

Amount transferred to charity - QCD

Social Security Benefits (SSA-1099)

Rentals, Royalties, and Farm
Rental Properties & Royalties (1099-MISC)
Farm Income & Rental

Other Income
Unemployment & Government Payments (1099-G)
Received K-1
HSA/MSA Withdrawal (1099-SA)
Gambling Winnings (W-2G)
Amount not reported on W-2G
Received Alimony
Amount of Alimony Date of Divorce or Separation
Jury Duty
Amount Received Amount Repaid to Employer
Sold Main Home (gain or loss)
Date Purchased Purchase Amount Other Expenses
Home Foreclosure or Debt Cancellation (1099-A, 1099-C)
529 Plan or Coverdell ESA Withdrawal (1099-Q)
Other

Deductions and Credits

Home
Home Loan Interest (Form 1098)
Property Taxes
Main Home Additional Homes

Family
Child Care Credit
1. Child's Name Daycare Name
Daycare Provider SSN/EIN Daycare Address

Total Amount Paid
2. Child's Name Daycare Name
Daycare Provider SSN/EIN Daycare Address
Total Amount Paid
3. Child's Name Daycare Name
Daycare Provider SSN/EIN Daycare Address
Total Amount Paid
Adoption Credit
Child's Name Birth Year
SSN, ATIN, or ITIN Adoption Expenses
Does child have special needs? Yes No Is child a U.S. citizen? Yes No
Paid Alimony
Recipient's Name Recipient's SSN
Alimony Amount Date of Divorce/Separation

Charitable Donations

Cash/Check Donations
Total Amount Donated
Non-Cash Donations
1. Organization Name Organization Address
Description Date of Contribution
Donation Value Cost Basis Date Acquired
2. Organization Name Organization Address
Description Date of Contribution
Donation Value Cost Basis Date Acquired

Retirement

Retirement Contributions
Traditional IRA Amount converted to Roth IRA

Roth IRA
SEP
Solo 401(k)

Education and Work

College Tuition & Expenses (1098-T)
Cost of Supplies (purchased at school) Cost of Supplies (purchased elsewhere)
Did you receive financial aid not reported on a 1098-T? Yes No
Student Loan Interest (1098-E)
Educator Expenses
Amount Spent

Vehicles & Personal Property

Major Purchases
1. Description Sales Tax Paid
2. Description Sales Tax Paid
Car Registration Fees
1. Make & Model Amount
2. Make & Model Amount
Casualties and Thefts
Description of Event Date
Property Lost or Damaged Cost

Energy Efficiency Credits

Home Energy Credits
Exterior Doors Exterior Windows Metal/Asphalt Roof
Insulation Building Property Furnace Fan
Furnace/Water Boiler Solar Heating Wind Energy Property

Heat Pump Fuel Cell Property Fuel Cell Capacity
Energy Efficient Vehicles
Make Model Year
VIN Date Purchased Credit Amount
Energy Efficient Charging Station
Cost
Medical
Contributions to HSA/MSA (Form 5498-SA)
Amount
Medical & Dental Expenses
Medical Professionals Prescription Drugs Labs and X-rays
Medical Facilities Medical Supplies Glasses & Contacts
Medical & Dental Ins. LTC Ins. (You) LTC Ins. (Spouse)
Travel Expenses No. of Miles Traveled Other
Affordable Care Act (1095-A)

Self-Employment Worksheet

Work Description

Type of Work Business Name

Income

1099-NEC

1099-MISC

1099-K

Cash and Checks Amount Earned in Cash and Checks

Expenses

Advertising Commissions and Fees

Business Insurance Interest - Mortgage

Interest - Other Legal & Professional Fees

Office Expenses Rent - Vehicles, Equipment, etc.

Rent - Business Property Repairs & Maintenance

Supplies Taxes & Licenses

Business Travel Business Meals

Utilities Inventory

Bank Charges Dues & Subscriptions

Telephone Miscellaneous

Labor:

Contract Labor Expenses Did you pay any contractor \$600+? Yes No

Did you have any employees? Yes No Wages Paid

Vehicle:

Make & Model Date Purchased/Leased

Miles Driven (work and personal) Miles Driven (work only)
Parking & Toll Expenses Other Vehicle Expenses
Depreciable Assets:
1. Description Date Purchased Cost
2. Description Date Purchased Cost
Home Office:
Square Footage of Home Office Square Footage of Entire Home
Other Expenses:
1. Description Cost
2. Description Cost
3. Description Cost