

# Income Tax Organizer

## Individual Taxpayers

### Income

- \_\_\_\_\_ Applicable for new clients only: Social Security Card(s) for yourself and your dependents.
- \_\_\_\_\_ Applicable for new dependents only: Birth Certificates.
- \_\_\_\_\_ Applicable for new clients only: Previous year's Income tax return copies.
- \_\_\_\_\_ W-2, 1099-MISC. and or 1099- NEC: Original forms.
- \_\_\_\_\_ 1099-G form. If you collected unemployment
- \_\_\_\_\_ Alimony \$ total amounts paid to your ex-spouse.
- \_\_\_\_\_ 1099-B form: Statements from sales of stock.
- \_\_\_\_\_ Bank statements reporting interest earned from savings or checking accounts.
- \_\_\_\_\_ Rental income from rental properties and rental activity expenses such as mortgage, property taxes, maintenance, insurance etc.
- \_\_\_\_\_ Escrow final settlement statements reflecting purchase or sale of property (home)
- \_\_\_\_\_ Business income if any from self-employed activity and business expenses separated by category for the whole year such as Rent, Advertising, Utilities, Maintenance, etc.

### Miscellaneous

- \$ \_\_\_\_\_ Union Dues
- \$ \_\_\_\_\_ Tax Preparation Fee
- \$ \_\_\_\_\_ Education Expense
- \$ \_\_\_\_\_ Job Seeking Expense
- \$ \_\_\_\_\_ Professional License
- \$ \_\_\_\_\_ Journal-Mag.
- \$ \_\_\_\_\_ Safety Equipment
- \$ \_\_\_\_\_ Tool/Supplies etc.
- \$ \_\_\_\_\_ Safe Deposit Box
- \$ \_\_\_\_\_ Uniform Cost
- \$ \_\_\_\_\_ Investment Expense
- TI \_\_\_\_\_ Business Mileage

- \$ \_\_\_\_\_ Business Travel
- \$ \_\_\_\_\_ Business Meals
- \$ \_\_\_\_\_ Business Phone
- \$ \_\_\_\_\_ Gambling Losses

### Medical Expenses

- \$ \_\_\_\_\_ Insurance Premiums
- \$ \_\_\_\_\_ Prescription Drugs
- \$ \_\_\_\_\_ Doctor Visits
- \$ \_\_\_\_\_ Hospital Visits
- \$ \_\_\_\_\_ Dentists Visits
- \$ \_\_\_\_\_ Prescription Glasses
- \$ \_\_\_\_\_ Hearing Aids
- \$ \_\_\_\_\_ Hearing aid batteries
- TI \_\_\_\_\_ Medical miles traveled
- \_\_\_\_\_ Proof of medical insurance forms  
1095-A, 1095-B or 1095- C

### Taxes

- \$ \_\_\_\_\_ Real Estate Taxes
- \$ \_\_\_\_\_ Personal Property
- \$ \_\_\_\_\_ Tax payments to State
- \$ \_\_\_\_\_ DMV automobile registrations

### Donations to Nonprofit Organizations:

- \$ \_\_\_\_\_ Cash or Check
- \$ \_\_\_\_\_ Church
- \$ \_\_\_\_\_ Pay Roll Deductions
- \$ \_\_\_\_\_ United Way
- \$ \_\_\_\_\_ Cancer Society
- \$ \_\_\_\_\_ Goodwill
- \$ \_\_\_\_\_ Veterans
- \$ \_\_\_\_\_ Salvation Army
- \$ \_\_\_\_\_ Volunteer Expense
- TI \_\_\_\_\_ Volunteer miles traveled

### Deductible Interest

- \$ \_\_\_\_\_ Home Mortgage to banks
- \$ \_\_\_\_\_ If Paid to Private Party
- Name: \_\_\_\_\_
- Address: \_\_\_\_\_
- SS#: \_\_\_\_\_

- Childcare:** \_\_\_\_\_ Name, address, and social security number or employer number of care provider.
- Renters:** \_\_\_\_\_ Name, address, and phone number of landlords.
- Education:** \_\_\_\_\_ Registration and tuition expenses for any college education that applied to you and your dependents including form **1098-T** from the educational institute.

**Teachers Credit:** \_\_\_\_\_ Clear copy of Preliminary Credential to prove you are a teacher

**Location:** Ace Tax and Realty

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