

# Individual Income Tax Organizer

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<b>Name of Taxpayer</b>					SS#
First	M.I.	Last	Email		
Occupation			Date of Birth		
Address			City	State	Zip
County			Home phone		Cell
<b>Name of Spouse</b>					SS#
First	M.I.	Last	Email		
Occupation			Date of Birth		
<i>(Enter information below only if different from Taxpayer)</i>					
Address			City	State	Zip
County			Home phone		Cell
If you moved during 2017, enter your previous address.					Date of move
Filing status (circle 1): Single, Married Filing Jointly, Married Filing Separately, Widow(er), Head of Household					
Were you divorced or separated during the year? Y N      Were there any deaths in the family? Y N					
Have you received any notice from the IRS or state revenue department within the past year? Y N					
<b>Names of dependent children</b>					
<i>Child's full name</i>	<i>Social Security #</i>	<i>DOB</i>	<i>Months lived in home</i>	<i>Relationship</i>	<i>College student?</i>
Did any of the children have income above \$950? Y N      Do any of the children have a disability? Y N					
Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent? Y N					
<b>Other dependents or people who lived with you</b>					
<i>Name</i>	<i>Social Security #</i>	<i>DOB</i>	<i>Relationship</i>	<i>Income</i>	
If you are due a refund, would you like it directly deposited into your bank account? <i>Name of bank</i>					
<i>Checking</i>	<i>Savings</i>	<i>Routing transit number</i>		<i>Account number</i>	

## Questions - All Taxpayers

"You" refers to both taxpayer and spouse - enter "?" if unsure about a question

Circle One		
Y	N	Are either you or your spouse legally blind?
Y	N	Did you pay or receive alimony in 2017? <i>Paid/Received</i> \$ _____ <i>Recipient's SS#</i> _____
Y	N	Were any children born or adopted in 2017?
Y	N	Were you, your spouse, or any dependents attending college in 2017?
Y	N	Did you pay any tuition for a private school for a dependent or take classes yourself?
Y	N	Did you pay for child or dependent care so you could work or go to school?
Y	N	Did you purchase a new main home during the year?
Y	N	Did you sell a home in 2017? (Provide closing/ HUD statement)
Y	N	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased?
Y	N	Did you refinance a mortgage or take a home equity loan? (Provide closing statement)
Y	N	Did you use any mortgage proceeds for purposes other than to buy, build, or improve your home?
Y	N	Did you, or will you, contribute any money to an IRA for 2017?
Y	N	Did you pay any interest on a boat or RV loan?
Y	N	Do you have any children who earned more than \$1,900.00 of investment income?
Y	N	Did you pay sales taxes on a major purchase in 2017, such as a vehicle, boat, or home?
Y	N	Did you roll over any amounts from a retirement account in 2017?
Y	N	Will there be any significant changes in income or deductions next year, such as retirement?
Y	N	Did you have any uninsured loss to your property in 2017?
Y	N	Did you work from a home office?
Y	N	Did you use your car for business purposes?
Y	N	Did you sell or transfer any stock or sell rental or investment property?
Y	N	Did you receive any income from an installment sale?
Y	N	Do you own a business or an interest in a partnership, corporation, LLC, or other venture?
Y	N	Have you paid alternative minimum tax (AMT) in previous years?
Y	N	Did you have any investments become worthless or were you a victim of investment theft in 2017?
Y	N	Were you granted, or did you exercise, any employee stock options during 2017?
Y	N	Did you pay anyone for domestic services in your home?
Y	N	Did you engage in any farming activities?
Y	N	Did you purchase a new energy-efficient car, truck, or van?
Y	N	Did you make any new energy-efficient improvements to your home?
Y	N	Are you involved in bankruptcy, foreclosure, repossession, or had any debt cancelled?
Y	N	Are you a member of the military?
Y	N	Were you a citizen of or live in a foreign country, or receive income from a foreign investment or account?
Y	N	Would you like to allow your tax preparer or another person to discuss your return with the IRS?

State information	Full-year resident	Part-year Resident	Nonresident
States of residence during 2017 and dates			
Do you rent or own your home?			

## Income Related Questions

"You" refers to both taxpayer and spouse - enter "?" if unsure about a question

Circle One	
Y N	<b>Form W2</b> - Did you have wage income?
Y N	<b>Form 1099-INT</b> - Did you have any interest income?
Y N	<b>Form 1099-DIV</b> - Did you have any dividend or distribution income?
Y N	<b>Form 1099-R</b> - Did you have any distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.?

If before age 59 1/2, give reason to determine if an exception to penalty applies.

Y N	<b>Schedule C</b> - Did you own and operate a non-incorporated business?
Y N	<b>Schedule E</b> - Did you rent out real estate property for its fair market value?
Y N	<b>Form 1099-G</b> - Did you receive any unemployment compensation?
Y N	<b>Form 1099-MISC</b> - Did you have income from contract work over \$600?
Y N	<b>Form 1099-B</b> - Did you sell any stocks in 2017? ( <i>*see notes below</i> )
Y N	<b>Form K-1</b> - Did you receive pass-through income for estate, trust, S corporation, or partnership?
Y N	<b>Form W2G</b> - Did you have any gambling winnings and receive a tax form from the casino(s)?
Y N	Did you receive any tax-exempt interest, such as from municipal bonds? (include statement)
Y N	Did you receive a state tax refund from one or multiple states?
Y N	<b>Form SSA-1099 or RRB-1099</b> - Did you receive any social security/ railroad retirement benefits?
Y N	Any unreported tips for 2017?

## Sales and Exchanges

Provide information about sales of real estate or other property, along with form 1099-S and other supporting statements.

Description of property	Purchase date	Cost/basis	Sell date	Sale price

### Notes:

\*When stock is sold, you will usually receive Form 1099-B, *Proceeds From Broker and Barter Exchange Transactions*, reporting the proceeds from the sale. However, your statement will not always provide the cost/basis information necessary to compute gain or loss. If the statement does not contain the cost/basis information, you must provide it. You may need to contact your broker for questions about cost/basis of your stock accounts.

\*Often, "transfers" of stock or mutual funds within a brokerage account are actually sales of one type of stock and purchase of another. Even if you did not receive any cash from the transaction, you may have taxable gain or loss.

\*If your stock dividends are automatically reinvested, the dividends will be taxable even though you did not receive any cash. The transaction is treated as if you had received cash and purchased additional stock. When the stock is sold, the amount reinvested over the years is taken into account. You may need to contact your broker for questions about the amount of reinvested dividends.

\*If you sold property other than stock, your taxable gain or loss will be determined by your cost/basis. The cost/basis is usually the original purchase price plus improvements (the cost of repairs and maintenance are not taken into account for cost/basis).

## Adjustments to Income

Y	N	<i>Educator expenses.</i> Classroom expenses of teachers, counselors, and principals. Maximum \$250 each (\$500 joint)
Y	N	<i>Health savings account deduction (HSA).</i> Include proper form.
Y	N	<i>Self-employed SEP, SIMPLE, and qualified plans.</i> Some contributions for 2017 may be made in 2018.
Y	N	<i>Self-employed health insurance deduction.</i> Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.
Y	N	
Y	N	<i>Student loan interest deduction.</i> Paid for taxpayers and dependents.
Y	N	<i>Moving expenses.</i> Job-related move and at least 50 mile increase in commuting distance.
Y	N	<i>Business expenses of reservist, performing artists, and fee-based government officials.</i>

## Itemized Deductions

Deductions must exceed \$6,350 Single, \$12,700 MFJ, \$9,350 HOH, or \$6,350 MFS to be a tax benefit.

**Medical Expenses.** Must exceed 10% of income to be a benefit - include cost for dependents - do not include any expenses that were reimbursed by insurance.

Dentists	\$	Hospitals	\$	Doctors	\$	Insurance	\$
Equipment	\$	Prescriptions	\$	Eyeglasses	\$	Other	\$
Medical miles:							

**Charitable Contributions.** If over \$500 in noncash charitable contributions, provide details of contributions. New rules require that the taxpayer retain documentaion for all cash contributions.

Cash	\$	Charitable mileage	_____	miles	_____
Noncash contributions (FMV). Clothing or household items must be in good used condition or better.					\$
Did you transfer funds from an IRA directly to a charity?			Y	N	

**Taxes Paid.** Do not include taxes paid for full or partial business or rental-use property, including business use of home.

State estimated taxes - paid in 2017	\$	Personal property taxes	\$
Real estate tax - residence	\$	Real estate tax - other	\$
Property tax refund - 2017	\$	Foreign tax paid	\$
Other	\$		
Balance paid in 2017 from prior year returns		\$	
Did you keep receipts for sales tax paid during 2017?		Y	N
Did you purchase a car, plane, boat, or home in 2017?		Y	N
Sales tax	\$	Purchase paid	\$
		Date	

**Interest paid.** Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide forms 1098 or lender information and ID numbers.

Main home	\$	Equity loan	\$
Second home	\$	Equity loan	\$
Points	\$	Investment interest	\$
Did you pay a mortgage insurance premium when you purchased your home?			Amount \$
			Date

**Miscellaneous Itemized Deductions.** The following must exceed 2% of income to be a benefit. Do not include expenses that were reimbursed by your employer. *Note: These are expenses for NON SELF-EMPLOYED*

Legal fees	\$	Investment expenses	\$	Supplies	\$
Job education	\$	Job seeking	\$	Tools	\$
Safety equipment	\$	Subscriptions	\$	Dues	\$
Tax prep fees	\$	Uniforms	\$	Tools	\$
Union dues	\$	Other	\$		

**Casualty and Theft Losses.** If you suffered any sudden, unexpected damage or loss of property, or a theft, provide details to your tax preparer.