



TAX ORGANIZER

This document is for your tracking and/or document collection purposes only. You are not required to fill it out or share with me, however, you are welcome to do so if you'd like.

PERSONAL INFORMATION GENERAL

PERSONAL INFORMATION

Full Name: _____ Date of Birth: _____ SSN: _____

Spouse Name: _____ Date of Birth: _____ SSN: _____

Filing Status : Single Married Filing Jointly Qualifying Widow/er
 Head of Household Married Filing Separately

Address: _____

Your Occupation: _____ Spouse Occupation: _____

Phone Number: _____ Email: _____

Tax Payer Driver's License:

Spouse Driver's License:

DL Number: _____

DL Number: _____

Issue Date: _____

Issue Date: _____

Expiration Date: _____

Expiration Date: _____

Banking Information:

Financial Institution: _____

Account Number: _____

Routing Number: _____ Savings Checking

DEPENDENTS INFORMATION

Dependent #1

Full Name: _____ Date of Birth: _____ SSN: _____

Relationship: _____

Dependent #2

Full Name: _____ Date of Birth: _____ SSN: _____

Relationship: _____

Dependent #3

Full Name: _____ Date of Birth: _____ SSN: _____

Relationship: _____

FOR THOSE THAT ARE FILING HEAD OF HOUSEHOLD

HEAD OF HOUSEHOLD QUALIFIER

Full Name: _____ Date of Birth: _____ SSN: _____

Relationship: _____

No. of days they lived with you: _____

Amount of income they earned that year: _____

PERSONAL INFORMATION INCOME

INCOME

W-2s

W-2 from _____ W-2 from _____

1099s

1099-Int from _____ 1099-Int from _____

1099-DIV from _____ 1099-DIV from _____

1099-R from _____ 1099-R from _____

1099-MISC from _____ 1099-MISC from _____

1099-NEC from _____ 1099-NEC from _____

1099-B from _____ 1099-B from _____

K-1s

K-1 Form from _____ K-1 Form from _____

Social Security

1099 SSA Form

1099 SSA Form

Other Income

W-2 G (Gambling Winnings)

1099-G (Unemployment or Prior
Year State Refund)

*If you have other documents that are income or seem like they are income related, please provide them to your tax preparer. *

PERSONAL INFORMATION ADJUSTMENTS

ADJUSTMENTS

Educator Expenses _____
(for educators, max \$250 deduction)

SEP and or SIMPLE
Contributions _____

Self-Employed Health
Insurance Deductions _____

Penalty on early
withdrawal of savings _____

Alimony Paid To _____
First Name Last Name SSN Divorce Date Amount Paid

Deductible IRA _____

Student Loan Interest

1098-E Form from _____

1098-E Form from _____

Economic Impact Payments

Amount Received
from 3rd Stimulus _____

Amount Received
from 4th Stimulus* _____

Advanced Child Care Payments
Amount Received _____

*At the time of making this tax binder, the 4th stimulus was still being negotiated, we've included a section IF the government passes another stimulus package

PERSONAL INFORMATION ITEMIZED DEDUCTIONS

(also known as Schedule A)

ITEMIZED DEDUCTIONS/SCHEDULE A

Medical Expenses(Out-of-Pocket)

Insurance Premiums: _____

Prescriptions: _____

Co-pays: _____

Dental: _____

Procedures: _____

Vision: _____

Property Tax

Personal Property Tax

DMV Registration

Fees

Vehicle #1: _____

Vehicle #2: _____

Vehicle #3: _____

Vehicle #4: _____

Mortgage Interest

1098 Form from _____

1098 Form from _____

Mortgage Insurance Premiums (usually found on 1098 Form with Mortgage Interest)

Charitable Contributions

Gifts by Cash or Check: _____

Other than by Cash or Check: _____

(Donations to Goodwill, Salvation Army, etc - give your tax preparer the donation receipt you received)

Job Expenses and Most Other Misc Deductions

(This is no longer federally applicable, however in California you can still take advantage of these expenses)

Prior Year Tax Preparation Fee: _____

Unreimbursed Employee Expenses: (Consult with your Tax Preparer regarding these deductions)

Parking, Tolls, Transportation: _____

Travel away from Home: _____

Vehicle Information: _____

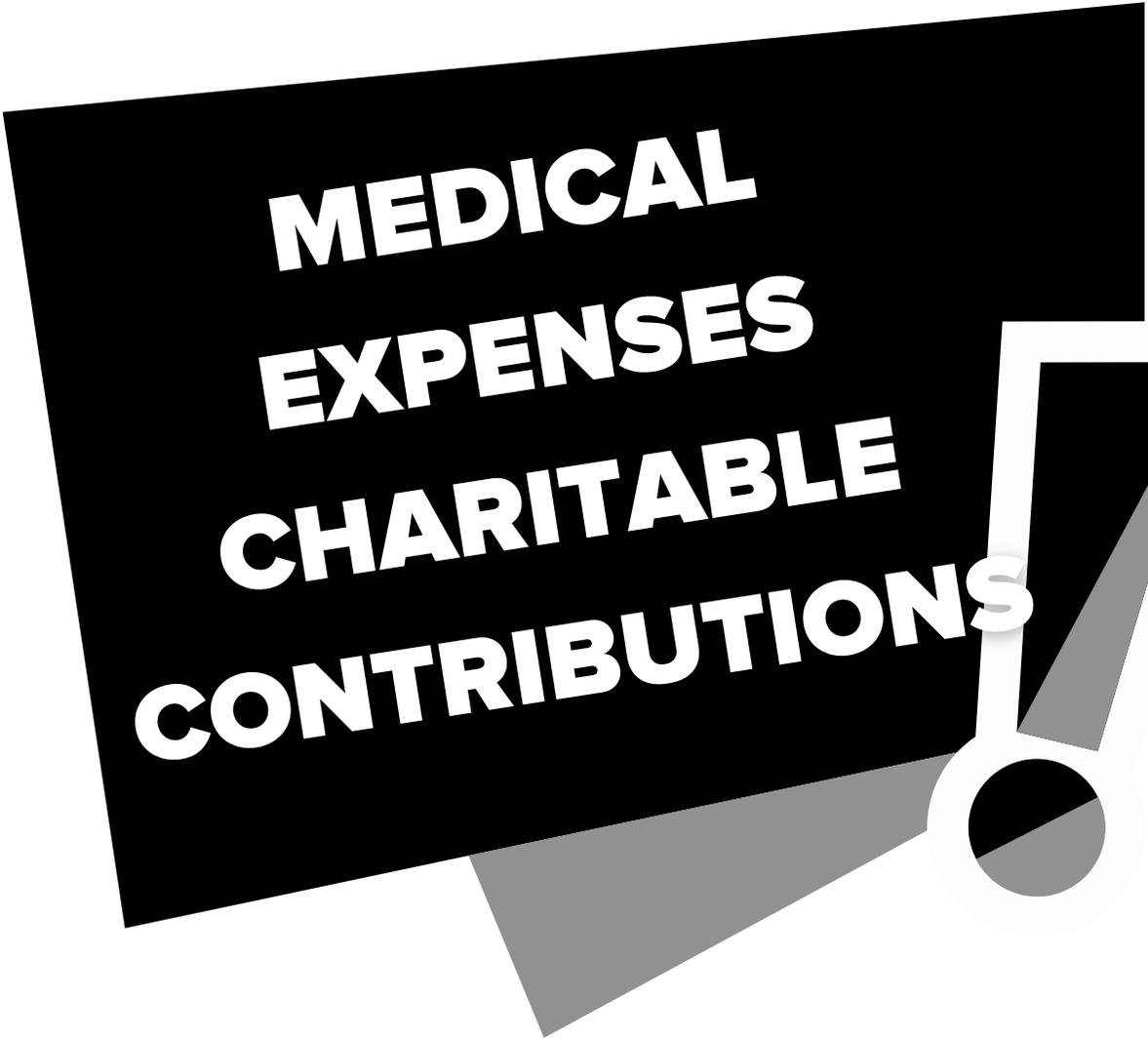
Date Placed in Service

_____ Total Miles for the Year

_____ Business Miles

| | Amount |
|-----------|----------------------|
| Gas | <input type="text"/> |
| Insurance | <input type="text"/> |
| Licenses | <input type="text"/> |
| Oil | <input type="text"/> |
| Parking | <input type="text"/> |

| | Amount |
|-------------|----------------------|
| Payments | <input type="text"/> |
| Rental fees | <input type="text"/> |
| Repairs | <input type="text"/> |
| Tires | <input type="text"/> |
| Tolls | <input type="text"/> |



Use these tracking pages



OTHER PERSONAL INFORMATION

OTHER

Education Credits (1098-T Form) (Taxpayer, spouse, or dependent college expenses and grants or scholarships received)

Child Care Expenses

Child Care Provider: _____ Child Care Provider: _____

Address: _____ Address: _____

Phone Number: _____ Phone Number: _____

SSN or EIN: _____ SSN or EIN: _____

Amount Paid: _____ Amount Paid: _____

Health Care Forms (1095-A, 1095-B, 1095-C)
You may also receive health care forms from the state

Estimated Tax Payments

FEDERAL | Date/Amount Paid: _____
Date/Amount Paid: _____
Date/Amount Paid: _____
Date/Amount Paid: _____

STATE | Date/Amount Paid: _____
Date/Amount Paid: _____
Date/Amount Paid: _____
Date/Amount Paid: _____

HSA Contributions

Notes

Bonus

How to Check the Status of Your Tax Refund

****To Make This Process Easier Please Have A Copy of Your Tax Return on Hand****

Please allow approximately 2-3 days after E-filing your taxes to check the Refund Status
If you paper-filed your tax return, please allow for 1 to 2 weeks before checking your Refund Status

FEDERAL

Go to: <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp>

Enter in your SSN, Filing Status, and the Exact Refund Amount (Federal Refund)

This should show you which step the IRS is at in regards to sending out your refund.

STATE

(every state's refund website may be a bit different but they will ask for information that is on your tax return)

Click here to find your states' revenue department website:

<https://www.irs.gov/tax-professionals/government-sites>

****Please note: On the Federal side, you do not get refunds nor will you owe anything for small businesses (S-Corp, LLC or LP), these entities "Pass-Through" (their income or losses) to your personal tax return so if you get a refund or if you owe a balance it will be on your personal return, NOT your business return****

****Also note: On the State side, you may owe or you may get a refund depending on your state be sure to review your tax return to check if you're getting a refund or if you owe****