



2013 Tax Organizer

Income Items

- Wages
- Bonus/Commissions
- Cancellation of Debt Income
- State Tax Refunds
- Alimony
- Unemployment Compensation
- Social Security
- 1099 Income/Statements (All)
- Gambling - W2G
- 401K Withdrawals
- Pension Plans
- Profit Sharing

Interest/Dividend Income (please list)

Savings/CD

Money Market

Stock Sales

(Provide purchase & selling price(s))

Taxes

- Real Estate
- State/Local Taxes
- Personal Property
- Other: _____

Interest Paid

- Home Mortgage/Home Equity
- Mortgage Insurance Premiums
- HUD-1 Settlement Statement (Purchase or Refinance)
- Deductible Points
- Investment Interest
- Student Loan Interest

Child Care Expenses

(Must have the following information)

Name: _____

Address: _____

Tax ID #: _____

Miscellaneous Items

Above 2% of AGI

- Tax Return Preparation Fees
- Safe Deposit Box
- College Tuition & Books

Retirement Accounts

Fee(s): _____

Contribution(s): _____

Employee Business Expense

- Uniforms
- Union Dues
- Professional Fees/Licenses
- Publications
- Required Supplies
- Tools
- Unreimbursed Mileage
- Job Search Expenses

Contributions

Church \$ _____

Charities \$ _____

Other than Cash _____

Volunteer Work Expenses \$ _____

Medical/Dental Expenses

Expenses must exceed 10% under 65 and 7.5% over 65

- Insurance Premiums
- Prescription Drugs
- Doctor/Dental
- Chiropractor
- Hospital
- Labs/Tests/X-Rays
- Therapy
- Transportation/Mileage

Job Related Moving Expenses
