

PERSONAL INCOME TAX ORGANIZER

»» Changes ONLY...no need to repeat if I have prior year's.

Name(s) *	DOB	SS#		
Address	DOB	SS#		
Occupations	Phones	E-mail		
Dependents Full Names *	DOB	SS#	Mos.Home	Relationship
1				
2				
3				
4				

* NOTE: All names must match Social Security Administration records!
Have you adopted and incurred adoption expenses? Yes No

Please Review These	Any changes in the home? Moved in/out/births/deaths/married/divorced _____
	Do you have kids you claim and you're not the custodial parent? Y _____ N _____ If yes, Form 8332? (Divorces after July 08)
	Contact info: e-mail, cell #'s: Any changes? _____
For Direct Deposit only: same account as last year? Bank Name _____	

✓

I	Salaries:	Attach ORIGINAL W-2's—keep Copy C.	
N	Commissions, Misc. Income:	Attach 1099's (copies are fine)	
N	Interest & Dividends:	Attach 1099's (copies are fine)	
C	Capital Gains/Losses: Description	Buy Date Sale Date Sale Amt Cost (incl div reinv)	
O	(Attach Year End Broker Statements/1099's)		
M	Other: Attach any K-1's & 1099's for: investments, alimony rec'd, state tax refunds, pension/IRA distributions (ORIGINAL 1099R), unemployment received, lottery winnings, tips, etc.		
E	Rental Activity: Attach schedule of Income & Expenses—Did you send 1099's to anyone? Do you rent to a family member? If so, is it at fair market and can you prove that?		

- ➔ IMPORTANT: If you have taken distributions/withdrawals from pensions/401(k)'s/IRA's, what did you do with them? Rollover/Med. Expenses/ Educ. Expenses/ 1st Home Buy? Have you contributed to either a Roth IRA or non-deductible IRA? Ever? _____
- ➔ Do you have a foreign financial account or an interest in a business >\$50k? (Real estate doesn't count) Have you contributed to an Education account, either a 529/Coverdale Savings/Brightstart? Teachers: Classroom Expenses _____ (Max. 250)
- ➔ Major purchases (boats, vehicles, home improv. mat'ls) for sales tax? Amount _____ Did you make any Energy Improvements to your home? Windows/Doors/Heating/AC? Did your kids work? I need their W-2's Are you an officer of a nonprofit org or club? _____ 990 Filed?

Business Income and Expenses: attach a summary if I don't keep your books.
Did you receive a 1099-K for credit card processing? Attach it.
Have you filed required 1099-MISC's for unincorporated service providers >\$600 last year?

Do you have any unreported cash? Y N

E X P E N D I T U R E S	IRA/SEP/Roth Contributions _____ Were you/spouse covered in another plan? Y ___ N ___				
	Note: Would you like an IRA contribution taken from your refund, if you have one? _____				
	College Tuition/Expenses (Attach 1098-T Yr Pd Amounts Paid/School		IL K-12 Educ. Exp.		
	For whom? _____ Year: F S J S Grad _____				
				Student Loan Interest	
	Moving Expenses: Attach paperwork _____		Alimony Paid _____		
	Medical (must exceed 10% of income unless 65 or over) _____		MSA/HSA Contrib. _____		
	Property Taxes: Home _____ Vacation Property _____ Other _____				
	Add'l Taxes paid as a result of notice or audit _____ (enclose notices)				
	Mortgage Interest: Home _____		Vacation Property _____		
Home Equity Line _____		Mort. Insur. Pd on new mortgages: _____			
How much was your original mortgage: Home _____		Vacation/other _____			
Have you re-fi'd? What were cash proceeds used for? _____					
Important: Real Estate purchase, sale, or re-fi, attach settlement statements from all closings.					
Investment Interest to purchase stocks, business, etc. _____ (Business interest used <u>in</u> a business should be included on the Business Profit & Loss.)					
Charitable: \$ _____		Mileage for charity _____			
Do you have receipt letters for any donations >\$250? If not, get them now!					
Clothing, food, etc. over \$500: Provide a list of dates, items given, values (please, I don't need receipts)					
Miscellaneous (must exceed 2% of income): Tax prep pd. personally, union dues, unreimbursed business expenses, uniforms, tools, job-related tuition.					
Employee Business Expense:		Vehicle lease _____			
Office in Home: _____		Gas/Oil _____			
Sq. Footage: Total _____ Office _____		Supplies _____			
Total Utilities _____		Phone _____			
Insurance _____		Travel _____			
Repairs/Maint _____		Gifts/Other _____			
Total _____ Business _____		Do you keep a mileage log? Y N			
If you sold/traded/purchased/leased a vehicle used for business, attach bill of sale.					
Childcare (# of kids ___)		Payee Names/ID#	Address	Amt. Pd.	
Tell me what you <i>actually</i> paid and when:					
Estimated Taxes:		#	Dates Paid	Fed	State
		1			
		2			
		3			
		4			
★★★★★ Did you have health insurance? Y N If yes, how? HEALTH CARE INFO Who is covered by it? Have you received any 1095 forms? Please attach. Please enclose kids' W-2 forms if you got, ★★★★★ If no insurance, tell me why: _____ or can get, a subsidy					

To the best of my knowledge, this is everything necessary for the preparation of my tax returns, and I can substantiate it as required. I've enclosed all relevant supporting documents. J ROBERTS ACCOUNTING INC. agrees to prepare federal and state tax returns as required based on the information provided, and will advise you of any pertinent matters.

Signed _____ Date _____