



31090 Reserve Dr Unit 3, Thousand Palms CA 92276

Tax Organizer

1) INCOME - CHECKLIST:

Please bring the following if checked:

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|--------------------------|---|
| ☐ | Driver's License & Social Security Card (for Identity Verification) |
| ☐ | All W-2 forms |
| ☐ | 1099-R (Pension, IRS, 401K, etc.) |
| ☐ | 1099-INT (Interest Earned from Bank or Mortgage) |
| ☐ | 1099-DIV (dividend income) |
| ☐ | 1099-G (Unemployment, State Refund) |
| ☐ | 1099-SSA (Social Security) |
| ☐ | 1099 MISC |
| ☐ | W2-G (Gambling) |
| ☐ | Any other income reported to IRS |

2) QUESTIONNAIRE:

- | | |
|--------------------------|---|
| ☐ | Did anything change from last year? Name, status, dependents, address. |
| ☐ | Did you sell a house? Bring Final Escrow Settlement |
| ☐ | 1095A, B, OR C PROOF OF HEALTH INSURANCE |
| ☐ | Did you buy or sell stocks or bonds? Bring 1099-DIV |
| ☐ | Do you have rental property? Bring expenses |
| ☐ | Are you self-employed? Bring expenses. |
| ☐ | Did you pay for childcare? Bring name, social security #, and Telephone # |
| ☐ | Did anyone in your family attend college? Bring 1098T to receive credit |
| ☐ | Did you move more than 50 miles to be closer to your job? |
| ☐ | Did you have any Casualty and theft property losses? |



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3) ITEMIZED DEDUCTIONS:

Health Insurance	\$		\$
Medical Expenses	\$		\$
Property Taxes	\$		\$
DMV Fees	\$		\$
Mortgage Interest	\$		\$
Donations	\$		\$
Job Expenses	\$		\$
Education Expenses	\$		\$
Gambling Losses	\$		\$

4) SELF-EMPLOYMENT AND RENTALS: 1099-MISC

Income	\$
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5) BUSINESS EXPENSES:

Advertising	\$	Other Business Expenses	\$
Auto Expense	\$	Rent	\$
Commissions	\$	Repairs & Maint.	\$
Contract Labor	\$	Supplies	\$
Insurance	\$	Taxes, Licenses, & Permits	\$
Interest	\$	Telephone, Cell	\$
Office Expense	\$	Utilities	\$
Legal & Acct. Fee	\$	Wages	\$
Equipment, Parts	\$	Days Worked Away/ Overnight	\$