

Fillable Tax Organizer for Form 1040

Receiving Tax Info in bits and pieces makes it very time consuming and expensive.

**Please fill out this Tax Organizer and Mail OR Email to us
along with your original documents like W-2, 1099, 1098, K-1 etc.**

Click on pages you want to select

- Tax year - _____
- Mandatory - Personal Information - 1
- Page 1 - Personal Information – 2
- Page 2 - Sources of Income
- Page 3 - Itemized Deductions - 1
- Page 4 - Itemized Deductions - 2
- Page 4 - IRA and Other Deductions
- Page 5 - Business Deductions
- Page 6 - Rental Property Deductions
- Page 7 - Auto / Travel Deductions
- Page 8 - Foreign Income / Bank A/C Reporting

**PLEASE SUBMIT YOUR TAX INFO BEFORE APRIL 5
WE NEED TIME TO ANALYZE YOUR TAX INFO**

**SAVE THIS PDF FILE AND PASSWORD PROTECT
WITH LAST 4 DIGITS OF YOUR SS#
EMAIL TO US OR FAX IT AT 732 - 617- 6978**

TAX ORGANIZER

Personal Information - 1

This organizer is designed to help you with organizing information for Tax Preparation.

This organizer includes only the most common sources of income and expenses.

If you have additional sources, income from overseas, etc.

Please provide details on separate sheets.

Tax Payer – Full Name _____

Spouse – Full Name _____

Current Address: _____

County of Residence: _____

Tel # and Email Address _____

Tax Payer and Dependent Info:

Name	Relation	Date of Birth	SS#	# of Months with you
	Tax Payer			
	Spouse			

Tax Filing Status:

Single / Joint / Head of Household / Filing Separate / Widow/er with Children

Economic Stimulus Received:

Need info on Stimulus payment received. Also, if you received PPP Loan for Sch C Income, we need to know the date, amount received and if you spent the money accordingly or not.

If this is 1st year of Tax Preparation with us,
we need copies of your last year's Federal and State Tax Returns.

TAX ORGANIZER

Personal Information - 2

Need Copies of your Driver’s License – All Tax Payers

Copies of Form 1095 A / 1095 B / 1095 C– Health Ins

Last Pay Stub of the Year

Form 1098-T – Tuition paid Info

Copy of a Voided check to update Bank Info

Do you owe any unpaid Sales Tax from online or Out of State purchases? _____

NJ Residents...please state the Rent Paid for the year _____

Any PPP Loan Received? _____ Is it Forgiven? _____

Economic Stimulus Received? How Much? _____

ESTIMATED ADVANCE TAX PAYMENTS - DATES AND AMOUNTS

	Date Paid	Check #	Federal	State-1	State-2
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Did you receive, sell, send, exchange or acquire any financial interest in ANY Virtual Currency / Crypto Currency like Bitcoins? If yes, need all the info of transactions and holdings.

TAX ORGANIZER

INCOME SUMMARY

Forms	Details	How Many	Copy Enclosed? Y/N
W-2	W-2 / Salary Income		
1099-NEC	Non-Employee Compensation		
1099-Int	Interest Income		
1099-Div	Dividend Income		
1099-B	Sale of Stocks / Mutual Funds ***		
SSA-1099	Social Security Income		
	Disability Income		
P&L Statement	Self Employment Income		
1099-R	IRA / Pension Withdrawals / Rollovers		
1099-Misc	Rent Income – Property-1		
1099-Misc	Rent Income – Property-2		
1099-Misc	Rent Income – Property-3		
1099-Misc	Rent Income – Property-4		
Closing Statement	Sale of Home or Investment Property		
K-1	S Corp, LLC and Partnership Income / Loss		
1099-Misc	Royalty Income Received		
1099-G	State / City Income Tax Refunds		
1099-G	Unemployment Compensation Received		
1099-Misc	Gambling Income, Hobby Income, Other Income		

*** Please provide info on stocks / options sold...date and cost of purchase...If NOT on 1099-B

FYI Please note that Gambling and Hobby deductions are limited to the amount of Income Generated.

TAX ORGANIZER

ITEMIZED DEDUCTIONS SUMMARY - 1

Forms	Details	How Many	Copy enclosed Y/N
A	OWN HOME?		
1098	Mortgage Interest Paid - Primary Residence		
1098	Mortgage Interest Paid - 2nd Home		
1098	Real Estate Taxes Paid - Primary Residence		
1098	Real Estate Taxes Paid - 2nd Home		
1098	Points Paid this year		
1098	Home Equity Loan Interest Paid		
1098	Loan Balance at the end of Year		
	Do you rent out a part of your home? If so, include info on Pg 6		
	Do you use a part of your home exclusively for business purposes? If yes, Please provide % of sq foot used for the same.		
	FYI Did you know that capital gain of up to \$ 500,000 could be tax exempt on sale of your home?		
	Details	Amount?	Copy Enclosed Y/N
B	Medical Expenses		
	Health Insurance Paid		
	Doctor's Fees Paid / Co-Pay Amounts		
	Prescription Drugs Purchased		
	Hospitalization and Nursing Home Care		
	Travel & Other Medical Related Expenses		

FYI Medical expenses are deductible as itemized deduction only when they exceed 7.5% of Gross Income

If you have HSA, please confirm that you have High Deductible Health insurance plan – deductible of \$ 1,400 Individual and \$ 2,800 Family

TAX ORGANIZER

ITEMIZED DEDUCTIONS SUMMARY - 2

C Charitable contributions			
Name of the Charity – NEED RECEIPTS	Check #	Value of the Items Donated	Amount
1			
2			
3			
4			
5			

FYI You cannot deduct payments made to Charity for which you received services or products. For example, summer camp run by your religious organization, if your children attended the camps.

D Other Deductions		
Details	Backup Attached?	Amount
1 SEP / IRA / Keogh Contributions made for the year – Form 5498		
2 Child & Dependent Care Expenses		
3 Non-Deductible IRA / ROTH IRA Contributions for the year		
4 Gambling Losses		

TAX ORGANIZER

Own a Business?

Expense / Deductions Summary for the Year Own multiple businesses? Please prepare one for each business	Amount
Advertising Expense	
Auto / Travel to visit clients	
Office Cleaning & Maintenance	
Garbage Collection	
Business Gifts – FYI – Deductible Gifts are limited to \$ 25 per Person	
Insurances – Office	
Insurances – Mal Practice	
Legal / Professional Fees	
Material & Supplies	
Minor Repairs	
Mortgage Interest	
Office Expenses	
Office Rent	
Painting	
Real Estate Taxes	
Snow Removal	
Utilities – Gas & Electricity	
Warranties for maintenance	
Water Charges	
Payroll Costs	
Major Equipment Purchase	
Pension Costs for Employees	

FYI Commuting expenses –between your home and your place of work is not deductible.
 If you working at multiple locations...expenses between those different locations are deductible.

TAX ORGANIZER

Have a Rental Property?
Please report Rental income on page 1

Expense Details	Backup Attached Y/N ?	Location - 1	Location - 2	Location - 3	Location - 4
Please provide Street Address →					
Advertising for Renting					
Auto / Travel to Manage property					
Brokerage / Agent Fees					
Cleaning & Maintenance					
Garbage Collection					
Insurances					
Landscaping Expenses					
Legal / Professional Fees					
Material & Supplies					
Minor Repairs					
Mortgage Interest					
Painting					
Real Estate Taxes					
Snow Removal					
Utilities – Gas & Electricity					
Warranties for maintenance					
Water Charges					
Major Equipment Purchase					
Major Repairs – Remodeling / Re-Roofing					

Please provide us with closing statements any time you buy or sell a real estate.

Need full details of major purchases and major repairs done.

FYI Do you know that you can sell your rental property and roll over all the capital gains tax deferred in another property? Please ask us about the Tax Free Exchanges!

TAX ORGANIZER
AUTO & TRAVEL EXPENSE WORK SHEET

**If you used auto for business, managing rental properties, charity
Medical or moving purpose, please fill this page**

Make & Model of Vehicle	
Date Placed in Service	
Vehicle Cost	
Was the Vehicle Leased?	
Monthly Lease Amount	
Mileage Details	
Total Miles for the year	
Less: Total Commuting miles from home to first place of business / job	-
Less: Total Other Personal Miles Driven	-
TOTAL DEDUCTIBLE MILES DRIVEN AS FOLLOWS	=
Miles Driven for Business Purposes	
Miles Driven for managing rental properties	
Miles Driven For Charitable Purposes	
Miles Driven for medical purposes / moving	
Other Auto & Travel Expenses	
Gas, Oil, Repairs, Insurance etc	
Vehicle Registration, License	
Vehicle Lease, Rental Fees	
Parking Fees, Tolls, Transportation - day travel	
Overnight Travel, Car Rental, and Lodging	
Meals & Entertainment	
Other Business Expenses	

Foreign Income / Bank Account Reporting

Number of Bank and/or Investment Accounts - _____

FOR EACH ACCOUNT – PLEASE PROVIDE FOLLOWING INFORMATION AND BANK STATEMENTS /
DETAILS FOR THE WHOLE YEAR

Financial Institution Name _____

Financial Institution Address _____

Country/ Currency _____

Type _____

Account Owner Name(s) _____

Account Number _____

Opened Date _____

Closed Date _____

Provide Information in Foreign Currency

Interest Received _____

Dividend Received _____

Capital Gains / Losses _____

Foreign Tax Deducted / paid _____

Highest Balance _____

Copy of the Foreign Tax Return covering the calendar tax year

Do you have ownership interest in a Foreign corporation? Y / N

If yes, please provide details. We will request additional information.