

Individual Income Tax Income, Deduction and Credit Organizer

Please see the worksheets for self employment and rental property for deductions specific to those situations.

This worksheet provides a way for you to organize your income, credit and deduction information only. Whether or not an item is listed on this worksheet is not necessarily an indicator of whether or not an item is taxable or deductible. Tax regulations change often and specific circumstances may determine whether or not any item is relevant to your situation. This worksheet cannot substitute for tax knowledge or professional tax advice. Please contact Expert Tax & Accounting Services LLC with any specific questions or to book your tax appointment.

CLIENT: _____

Please bring all 1099, W-2, K-1, 1098, and other tax forms to your appointment.

Income Sources

Interest Income (Reported on 1099-INT)

Interest Income - Savings & Checking	\$	
Interest Income - Investments	\$	
Interest Income - Federal Bonds, T-Bills	\$	
Interest Income - State & Municipal Bonds	\$	
Other:	\$	

Dividend Income (Reported on 1099-DIV)

Name of Payer	Ordinary	Qualified
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$

Previous Year's State Tax Refund

State Tax Refund may be Federal Taxable Income	\$	
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Social Security, Pension, & Annuity Income

	Taxable	Non-Taxable
Social Security Income	\$	\$
Railroad Retirement	\$	\$
Federal Civil Service/Military Retirement	\$	\$
Other:	\$	\$

Other Income

Alimony Received	\$	
Tips Received (not reported on W-2)	\$	
Unemployment Income	\$	
Gambling Winnings	\$	
Other:	\$	