

Tax Organizer- Individual Income Tax Return

This Tax Organizer can be used to help identify the information needed to prepare your income tax return. Enter your information and if you need additional space, enclose a separate sheet with the details. Please return this organizer along with all Form W-2's, 1099's, and any other information you feel will assist us with the preparation of your individual income tax return.

PERSONAL INFORMATION					
Taxpayer's name _____	Social Security Number _____				
Spouse's name _____	Social Security Number _____				
Home Address _____	Apartment Number _____				
City or town _____	State _____	Zip Code _____	County _____		
Telephone #1 _____	Telephone #2 _____				
E-mail Address _____					
	Date of Birth _____	Occupation _____	Blind _____	Disabled _____	Date of Death _____
Taxpayer	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Spouse	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____

FILING STATUS	Indicate your filing status to be used on your income tax return:
<input type="checkbox"/> Single <input type="checkbox"/> Married Filing Joint <input type="checkbox"/> Married Filing Separate <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Widow(er)	
<input type="checkbox"/> Check if parent (or someone else) can claim you as a dependent on their return	

DEPENDENTS						Enter the following dependent information for any qualifying child or qualifying relative:	Child care expenses paid in 2005
First Name	Last Name	SSN	Relationship	Year of birth	# of months lived with you		

MISCELLANEOUS QUESTIONS		
Complete the following questions. If Yes, enclose supporting documentation.	Yes	No
1. Did you receive any notices or correspondence from the IRS or state agency during the year?	<input type="checkbox"/>	<input type="checkbox"/>
2. Did you sell your home during the past year?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did you refinance a mortgage during the past year?	<input type="checkbox"/>	<input type="checkbox"/>
4. Did you pay a household employee cash wages of \$1,400 or more during the past year?	<input type="checkbox"/>	<input type="checkbox"/>
5. Did you pay any expenses related to the adoption of an eligible child?	<input type="checkbox"/>	<input type="checkbox"/>
6. Did you receive any distributions from a health savings account (HSA), Archer MSA, or Medicare Advantage (MA) MSA reported to you on Form 1099-SA?	<input type="checkbox"/>	<input type="checkbox"/>
7. Did you provide housing for a person displaced by Hurricane Katrina, did you use your vehicle for volunteer work related to Hurricane Katrina, or were you directly affected by Hurricane Katrina?	<input type="checkbox"/>	<input type="checkbox"/>