

BHUPENDRA S. DARJI C.P.A., P.C.

CERTIFIED PUBLIC ACCOUNTANT



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TAX ORGANIZER

Taxpayer Information				Spouse Information			
Last name		Suffix		Last name		Suffix	
First name				First name			
Middle Initial		Suffix		Middle Initial		Suffix	
Social security number				Social security number			
Date of birth				Date of birth			
Occupation				Occupation			
Work phone		Ext		Work phone		Ext	
Cell phone				Cell phone			
E-mail address				E-mail address			
Address						Apartment number	
City				State		ZIP Code	
Home phone		Fax number		Home phone		Fax number	

Dependent Information						
First name	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense	
Last name	Suffix	Relationship				

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees					
Student First Name	MI	Suffix	Student Last Name	Social Security Number	Qualified Expenses

For each student: 1) First/second year of post-secondary education? 2) At least 1/2 time? 3) Earning degree or other credential? 4) No drug offense? Attach details of the qualified education expenses.

Student Loan Interest Paid
 Enter qualified student loan interest

Income

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation	
Employer Name	Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc	
1099-R Payer Name	Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits		Taxpayer	Spouse
Social Security Benefits from Form SSA-1099	_____	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____	_____
Medicare B premiums withheld	_____	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income	
1099-MISC Payer Name	

Attach Form(s) 1099-INT – Interest Income	
1099-INT Payer Name	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income	
1099-DIV Payer Name	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc
 Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:
 Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:
 Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions		Taxpayer	Spouse
Traditional IRA contribution:	_____	_____	_____
Roth IRA contributions	_____	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____	_____

Deductions

Medical and Dental Expenses	Amount	Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Miles driven for medical purposes		
Other medical and dental expenses:		
Taxes	Amount	Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		
Interest Expenses		
Home mortgage interest paid – Attach Form(s) 1098. Lender's Name	Amount	Amount
Points paid on loan to buy, build or improve main home Lender's Name	Amount	
Cash/Check/Credit Card Charitable Contributions		
Charitable Organization	Amount	Amount
Charitable Organization	Amount	
Noncash Charitable Contributions		
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.		
Miscellaneous Deductions	Amount	Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		