

2019	1040	US	Tax Organizer
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Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2019 tax return. Please enter all pertinent 2019 information.

NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement.

NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement.

CLIENT INFORMATION

Taxpayer

Spouse

First name and initial		
Last name		
Title/suffix		
Social security number		
Occupation		
Date of birth (m/d/y)		
Date of death (m/d/y)		
1=blind		
Home phone		
Work phone		
Work extension		
Cell phone		
E-mail address		

Address	In care of	
	Street address	
	Apartment number	
	City	
	State	
	ZIP code	

DEPENDENTS

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

Dependent No.

Dependent No.

First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Date of death (m/d/y)		
Date of adoption (m/d/y)		
Social security number		
Relationship		
Months lived at home		

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Please enter all pertinent 2019 information. If you have attached a government form for an item, check the box and do not enter a 2019 amount.

WAGES, SALARIES AND TIPS

Employer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2019 Amount	2018 Amount
Attach Forms W-2	_____

INTEREST INCOME

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-INT	_____

DIVIDEND INCOME

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-DIV	_____

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Attach Forms 1099-R & W-2G	_____

_____	_____
_____	_____

Winnings not reported on W-2G.....
 Total gambling losses.....

OTHER GOVERNMENT FORMS - INCOME

<input type="checkbox"/>	Form 1099-B - Sales of stock (also include transaction history).....
<input type="checkbox"/>	Form 1099-MISC - Miscellaneous income.....
<input type="checkbox"/>	Form 1099-K - Merchant card and third party network payments.....
<input type="checkbox"/>	Form 1099-S - Sales of real estate (also include closing statements).

Attach Forms 1099	
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<input type="checkbox"/>	Form 1099-G - State tax refunds.....	Attach Forms 1099
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Taxpayer:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....
<input type="checkbox"/>	Form 1099-Q (529 Plan).....
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts).....

Attach Forms 1099	
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Spouse:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....
<input type="checkbox"/>	Form 1099-Q (529 Plan).....
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts).....

Attach Forms 1099	
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MISCELLANEOUS INCOME

Taxpayer: Alimony received.....		
Spouse: Alimony received.....		
Other: _____		

RETIREMENT PLAN CONTRIBUTIONS

	2019 Amount	2018 Amount
Taxpayer: Traditional IRA contributions (1=maximum).....		
Roth IRA contributions (1=maximum).....		
Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum).....		
Spouse: Traditional IRA contributions (1=maximum).....		
Roth IRA contributions (1=maximum).....		
Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum).....		

OTHER GOVERNMENT FORMS - DEDUCTIONS

<input type="checkbox"/> Form 1098-E - Student loan interest.....	Attach Forms 1098	
<input type="checkbox"/> Form 1098-T - Tuition and related expenses.....		

AFFORDABLE CARE ACT

<input type="checkbox"/> Form 1095-A - Health Insurance Marketplace Statement.....	Attach Forms 1095	
<input type="checkbox"/> Form 1095-B - Health Coverage.....		
<input type="checkbox"/> Form 1095-C - Employer-Provided Health Insurance Offer and Coverage		

ADJUSTMENTS TO INCOME

Taxpayer:		
Self-employed health insurance premiums.....		
Educator expenses.....		
Other adjustments to income:		

Alimony paid - Recipient name & SSN.....		

Spouse:		
Self-employed health insurance premiums.....		
Educator expenses.....		
Other adjustments to income:		

Alimony paid - Recipient name & SSN.....		

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs.....		
Doctors, dentists and nurses.....		
Hospitals and nursing homes.....		
Insurance premiums.....		
Long-term care premiums - taxpayer.....		
Long-term care premiums - spouse.....		
Insurance reimbursement.....		
Out-of-pocket lodging and transportation expenses.....		
Number of medical miles.....		
Other: _____		

TAXES PAID

State income taxes - 1/19 payment on 2018 state estimate.....		
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TAXES PAID (continued)

State income taxes - paid with 2018 state extension
State income taxes - paid with 2018 state return.
State income taxes - paid for prior years and/or to other states
City/local income taxes - 1/19 payment on 2018 city/local estimate.
City/local income taxes - paid with 2018 city/local extension.
City/local income taxes - paid with 2018 city/local return.
State and local sales taxes (except autos and special items).
Use taxes paid on 2019 purchases.
Use taxes paid on 2018 state return
Sales tax on autos not included above
Sales taxes paid on boats, aircraft, and other special items.
Real estate taxes - principal residence.
Real estate taxes - property held for investment.
Foreign income taxes.
[] Personal property taxes (including automobile fees in some states)...

Table with 2 columns: 2019 Amount, 2018 Amount. Includes 'Attach Tax Notice' row.

INTEREST PAID

Home mortgage interest and points paid:

[] Form entry field for home mortgage interest and points paid.

Table with 'Attach Forms 1098' label.

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):

Form entry lines for home mortgage interest not on Form 1098.

Table with 2 columns for 2019 and 2018 amounts.

Points not reported on Form 1098:

Form entry lines for points not reported on Form 1098.

Table with 2 columns for 2019 and 2018 amounts.

Mortgage insurance premiums on post 12/31/06 contracts.

Investment interest (interest on margin accounts):

Form entry lines for investment interest.

Table with 2 columns for 2019 and 2018 amounts.

Passive interest.

Table with 2 columns for 2019 and 2018 amounts.

CASH CONTRIBUTIONS

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Form entry lines for cash contributions.

Table with 2 columns for 2019 and 2018 amounts.

Volunteer expenses (out-of-pocket).

Number of charitable miles.

Table with 2 columns for 2019 and 2018 amounts.

NONCASH CONTRIBUTIONS

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

Form entry lines for noncash contributions.

Table with 2 columns for 2019 and 2018 amounts.

MISCELLANEOUS DEDUCTIONS

Union and professional dues.

Tax return preparation fee.

Safe deposit box rental.

Investment expenses.

Estate tax, section 691(c).

Unreimbursed employee expenses:

Form entry lines for miscellaneous deductions.

Table with 2 columns for 2019 and 2018 amounts.

Form entry lines for 'Other:' miscellaneous deductions.

Table with 2 columns for 2019 and 2018 amounts.