

HAMILTON TAX & BOOKKEEPING SERVICES LLC

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Tax Organizer

For

Year

Taxpayer's Name _____

Please bring the following to your appointment:

Last year's tax return, unless we prepared it.

Copies of all W-2s, 1099s, supporting documents of income and expense.

The mailing label given to you on the IRS tax booklet, if any.

Please answer the following questions:

Did you receive any notices from the IRS this past year?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Do you have a foreign bank account?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you pay to attend classes beyond high school?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you pay interest on a student loan this past year?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you receive any rental income from property?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Did you receive any farm income?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Do you have self-employment income or expense?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Were there any births, adoptions, or deaths in the family?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Income

Wages (attach W-2s)

Name of Employer

Taxpayer

Spouse

Interest Income (attach 1099-INT)

Payor (bank, etc.)	Amount
_____	_____
_____	_____
_____	_____
_____	_____

Dividends (attach 1099-Div)

Payor (company name)	Ordinary Div.	Capital Gain	Nontaxable
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Partnership, S-Corp., and Other Income (attach K-1)

List the sources

Real Estate Sold (home, vacation property, bare land, etc.)

Description	Selling Price	Date Purchased	Cost

Investments Sold (stocks, bonds, mutual funds, other)

Name	Cost	Date Acquired	Date Sold	Selling Price

Individual Retirement Account (IRA)

Contributions for this past year	Amount	Roth	Regular
Taxpayer			
Spouse			

Withdrawals from IRA (attach 1099-R)

Reason for withdrawals:

Other Pension or Annuity Income (attach 1099-R)

Payor	Reason for withdrawal

Other Income

Source	Amount
State income tax refund	_____
Commissions	_____
Unreported tips	_____
Installment sales payments received	_____
Alimony received	_____
Scholarships or grants	_____
Unemployment compensation	_____
Worker's compensation	_____
Disability income	_____
Other _____	_____

Moving Expenses (job related)

Did you move this past year due to change in job locations?

Yes No

Details: _____

Employment Related Expenses (not reimbursed)

Did you buy tools, uniforms, licenses, or pay dues or educational expenses in relation to your work this past year?

Yes No

Details: _____

Investment Expenses

Item	Amount
Investment interest paid	_____
Safe deposit box rent	_____
Tax preparation fee	_____
Other _____	_____