

Income Tax Organizer



8941 South 700 East, Suite 104 Sandy, Utah 84070

801-676-0945

www.KlinglerCPA.com

Here is your **Income Tax Organizer**. It will help you **organize your tax information** (and make sure you don't miss any **important deductions**). Whether you do your own tax return or use the services of a CPA firm like ourselves, we hope you'll find it useful.

Our fees are competitive. We run an efficient, friendly office — and we're here all year round to answer your questions. If you'd like to schedule an appointment, call and we'll arrange one **immediately**.

If you have any questions, make note of them within the booklet so that we can discuss them when we prepare your return.

Please provide all records and necessary information requested, including:

- Prior year federal and state returns (new clients only)
- W-2's for wages, salaries, tips and pensions
- 1098 for mortgage interest paid to financial institutions
- 1099's for interest, dividends or other payments
- K-1's from partnerships, S-Corps, estates or trusts
- Any Additional correspondence from tax agencies, if any

Please do not hesitate to call with any questions you may have. We look forward to hearing from you soon.

Phone: 801-676-0945

TAXPAYER INFORMATION		SPOUSE INFORMATION			
First Name	Initial	First Name	Initial		
Last Name		Last name			
SSN	DOB	SSN	DOB		
Occupation		Occupation			
T: Home	Cell	Home	Cell		
Email		Email			
Address		City	State	ZIP	

FILING STATUS	
<input type="checkbox"/> Single	<input type="checkbox"/> Head of Household
<input type="checkbox"/> Married	<input type="checkbox"/> Married Filing Separately

DEPENDENTS - Attached additional pages if necessary	
Name	
DOB	SSN
Relationship	Mths. Lived @ Home
Name	
DOB	SSN
Relationship	Mths. Live @ Home

	ESTIMATED TAX PAYMENTS			
	FEDERAL		STATE	
	Date	Amount	Date	Amount
Overpayment				
1 st Quarter				
2 nd Quarter				
3 rd Quarter				
4 th Quarter				

REFUND	
Automatic Deposit	<input type="checkbox"/> Yes (attach a VOID check) <input type="checkbox"/> NO

SALARIES & WAGES – Attach all W-2 forms		
W-2	Employer	Gross Wages
1		
2		
3		
4		

OTHER INCOME	
INTEREST – Attach Forms 1099INT	Total \$
DIVIDENDS – Attach Forms 1099DIV	Total \$
CAPITAL GAINS – Attach Forms 1099B, 1099S and year-end brokerage statements with purchase date and cost of each item.	
STATE TAX REFUND – Attach Forms 1099G	
<input type="checkbox"/> Check if you did NOT itemize in prior year	
ALIMONY RECEIVED	
Payor	
Payor's SSN	Amount
SOCIAL SECURITY BENEFITS RECEIVED – Attach Forms SSA-1099	
UNEMPLOYMENT BENEFITS RECEIVED – Attach Forms 1099G	
PENSIONS/IRA/ANNUITY DISTRIBUTIONS – Attach Forms 1099R	
INCOME FROM PARTNERSHIPS, ESTATES, LLCs, TRUSTS AND S-CORPORATIONS – Attach Forms K-1 and list any not yet received.	

OTHER INCOME – Attach detailed schedules
Including royalties, jury duty fees, finder's fees, director's fees, gambling winnings, disability payments, unreported tip income and any other income (whether taxable or not)

INTRODUCTIONS WELCOME

We welcome introductions to your family, friends & business associates who may need help with their taxes or financial planning.

INCOME FROM BUSINESS (Schedule C)	
General Information	
<input type="checkbox"/> Cash Basis <input type="checkbox"/> Accrual Basis <input type="checkbox"/> 1 st Year	
Principal Business/Profession	
Business Name	
Business Address	
City	State ZIP
INCOME	
Gross Receipts or Sales	
Returns & Allowances	
Other Income	
COST OF GOODS SOLD (if applicable)	
Inventory @ Beginning of the year	
Purchases	
Cost of Labor	
Materials & Supplies	
Other Costs	
Inventory @ End of the Year	
EXPENSES	
Advertising	
Car & Truck Expenses*	
Commissions	
Employee Benefits	
Insurance (other than health)	
Health Insurance Premiums for Self*	
Interest	
Legal & Professional	
Office Expenses	
Pensions & Profit Sharing	
Rent – Vehicles, Machinery & Equipment	
Rent – Business Property	
Repairs & Maintenance	
Supplies	
Taxes – Property	
Taxes – Other	
Travel	
Meals & Entertainment*	
Utilities	
Wages	
Other Expenses*	
* Attach detailed schedules	
HOME OFFICE	
Did you have a home office during the year? Yes <input type="checkbox"/> No <input type="checkbox"/>	
If yes, attach detailed schedule of expenses including mortgage interest (or rent), real estate taxes, utilities, property insurance, maintenance & cleaning.	

“It’s not what you earn, it’s what you keep!”

RENTAL INCOME & EXPENSES		
PROPERTY	#1	#2
Location		
INCOME		
Rent Received		
EXPENSES		
Advertising		
Association Dues		
Auto & Travel		
Cleaning/Maintenance		
Insurance		
Labor		
Professional Fees		
Miscellaneous		
Mortgage Interest *		
Other Interest		
Supplies		
Taxes		
Telephone		
Utilities		
Repairs		
Improvements:		
Other:		
*Please attached form 1098 from lender		

ADJUSTMENTS TO INCOME	
ALIMONY PAID	
Payee	
Payee's SSN	Amount

IRA CONTRIBUTIONS, ETC.	
IRA Deduction	
SIMPLE Plan Deduction	
KEOGH/SEP Deduction	
Education IRA Deduction	
Penalty on Early Withdrawal	

ITEMIZED DEDUCTIONS	
MEDICAL & DENTAL EXPENSES – Attach detailed schedules	
Prescriptions	
Insurance Premiums	
Doctors & Dentists	
Eyeglasses/Contacts	
Long Term Care Premiums	
HAS or MSA Contributions	
Other:	

TAXES PAID	
State & Local Income Taxes	
Real Estate Taxes – Residence	
Real Estate Taxes – Other Property	
Auto License: Number of cars	
Auto license: Fees Paid	
Personal Property Taxes	
Other Taxes:	

INTEREST PAID – Attach Forms 1098	
Home Mortgage (1 st)	
Home Mortgage (2 nd)	
Home Mortgage (Equity Line)	
Student Loan Interest	
Other Interest:	

CONTRIBUTIONS – Attach detailed schedules	
By Cash or Check	
Other than Cash	

MISCELLANEOUS DEDUCTIONS	
Union/Professional Dues	
Investment Expense*	
Tax Return Preparation Fees	
Safe Deposit Box Rental	
Unreimbursed Employee Bus. Expenses*	
Other Deductions:	
*Attach detailed schedules	

“It’s not what you earn, it’s what you keep!”

MISCELLANEOUS QUESTIONS

If any of the following items pertain to you or your spouse for the year 2012, please check the appropriate box and include all pertinent details.

- | | Yes | No | |
|-----|--------------------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any interest in, or signature or other authority over a bank, securities, other financial account or trust in a foreign country at any time during the year? |
| 2. | <input type="checkbox"/> | <input type="checkbox"/> | Do you own any foreign assets or have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms? Provide details. |
| 3. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive an inheritance from a foreign country or a distribution from a foreign trust? |
| 4. | <input type="checkbox"/> | <input type="checkbox"/> | Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during the year? |
| 5. | <input type="checkbox"/> | <input type="checkbox"/> | Are any of your unmarried children, who might be claimed as dependents, 19 years of age or older? |
| 6. | <input type="checkbox"/> | <input type="checkbox"/> | Did any of your children under age 19 or full-time students under age 24 have interest and dividend income of \$950 or more or total investment income of \$1,900 or more? |
| 7. | <input type="checkbox"/> | <input type="checkbox"/> | Do you have a health savings account (HSA) or a medical savings account (MSA)? |
| 8. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay an individual or an organization to perform services for the care of a dependent under 13 years old in order to enable you to work or attend school on a full-time basis? Provide details. |
| 9. | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay an individual to perform in-home health care services for yourself, your spouse, or dependents? |
| 10. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have expenses for a household employee? |
| 11. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur employment agency fees or job hunting expenses? |
| 12. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any education expense or student loan interest? |
| 13. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur moving expenses during the year due to a change of employment? |
| 14. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts, including mortgages, cancelled or forgiven or did you abandon property? |
| 15. | <input type="checkbox"/> | <input type="checkbox"/> | Does anyone owe you money that has become uncollectible? |
| 16. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur any legal fees? |
| 17. | <input type="checkbox"/> | <input type="checkbox"/> | Did you acquire or dispose of any assets (including real estate) during the year? |
| 18. | <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell or refinance your principal home or second home, or obtain a home equity loan? |
| 19. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any energy-efficient improvements or purchases for your home? |
| 20. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a casualty loss because of damaged or stolen property? |
| 21. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any gifts either outright or in trust? |
| 22. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any distribution from an IRA or other qualified plan? (Form 1099R) |
| 23. | <input type="checkbox"/> | <input type="checkbox"/> | If yes, was this rolled over? (Form 1099R) |
| 24. | <input type="checkbox"/> | <input type="checkbox"/> | Did you open a Roth IRA account or convert an IRA into a Roth IRA? |
| 25. | <input type="checkbox"/> | <input type="checkbox"/> | Were you or your spouse the beneficiary of COBRA premium assistance? |
| 26. | <input type="checkbox"/> | <input type="checkbox"/> | Were you granted or did you exercise any stock options? |
| 27. | <input type="checkbox"/> | <input type="checkbox"/> | Do you and your spouse each want to allocate \$3 to the Presidential Election Campaign Fund? |

"It's not what you earn, it's what you keep!"