



2014 Tax Organizer

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Tax Payer Information

Form fields for Tax Payer Information including Last, First, MI, SSN, Date of Birth, Occupation, email, Cell #, Home #, Work #, Address, Apt no, City, State, Zip.

Spouse Information

Form fields for Spouse Information including Last, First, MI, SSN, Date of Birth, Occupation, email, Cell #, Home #, Work #.

Dependents

Table with 5 columns: Name (First, MI, Last), Date of Birth, SSN, Relationship, Day Care Y/N.

Name of Child Care Provider and SSN/EIN fields.

Documents Needed

- List of documents needed with checkboxes: W-2 Wage income, W-2G Gambling winnings, 1099-INT Interest income, -DIV Dividend income, -B Sale of stocks, -MISC Self-employment and miscellaneous income, -R Retirement distributions, -SSA Social Security benefits, -SA Distributions from health savings account (HSA), -G Unemployment and other government payments, -C Cancellation of debt, -A Sale of home, 1098-T Student tuition, -E Student loan interest.

Itemized Deductions

- List of itemized deductions with checkboxes: Medical expenses\*, State taxes paid, Real estate taxes, Personal property taxes (auto), 1098 mortgage interest, Gifts to charity, Employee expenses\*\*.

\*subject to 7.5% or 10% of AGI

\*\*subject to 2% of AGI

Other Information

- Photo identification, Copy of previous year's tax returns, Previous year's property tax refund, Alimony, jury duty, or workers compensation, Unreported tips or other income, Moving expenses, Bank routing and account number for direct deposit, Rental income and expenses, Self-employment income, Auto expenses, Home office deduction expenses, Estimated tax payments.