



9890 south 300 West Suite 100
 Sandy, UT 84070
 Office: 888.400.4236
 Fax: 888.415.1262

PERSONAL INCOME TAX ORGANIZER

Name: _____ SSN#: _____
 Spouse: _____ SSN#: _____
 Address: _____ E-mail: _____

Did you purchase a new home or a new car in 2009? _____

DEPENDENTS

<u>Name</u>	<u>Relationship</u>	<u>SSN#</u>	<u>Birth Year</u>

INCOME

- Bring all copies of W-2 forms and 1099R forms
- Interest and Dividends from all sources (1099Div Forms)
- Social Security - Bring Form SSA 1099
- Sales from stocks and Mutual Funds (Name, # of Shares, Date Purchased/Cost, Date Sold/Amt)
- Misc. Income such as awards, gambling proceeds, jury pay, etc.

DEDUCTIONS

<u>Donations</u>	<u>Medical</u>
Cash	Dentists
Church	Doctors
Mileage	Glasses/Contacts
Non-Cash	Hospital
Other	Insurance
School/PTA	Prescriptions
United Way	<u>Job Expense</u>
<u>Interest</u>	Auto/Mileage
Home Mortgage	Dues
Equity-Line/2 nd Mortgage	Education
Points	Job Seeking
<u>Taxes</u>	Meals/Entertainment
Boat, Trailer, etc.	Phone/Cell
Real Estate	Travel
Vehicle	Tools/Supplies
	Uniforms

CHILD CARE EXPENSE

<u>Providers Name</u>	<u>Address</u>	<u>SSN# or Tax ID</u>	<u>Amount Paid</u>

COLLEGE TUITION CREDIT

<u>School Name</u>	<u>Amount Paid for Tuition</u>	<u>Amount Paid for Books</u>	<u>Amount Paid for Class Fees</u>

