

Please use this tax preparation organizer as a guide for gathering documents to complete your tax return.

**INCOME DOCUMENTS**

- \_\_\_\_\_ Wages (W2 Forms)
- \_\_\_\_\_ Contract Labor (1099 MISC)
- \_\_\_\_\_ Interest Earned (1099-Int)
- \_\_\_\_\_ Dividends Earned (1099-Div)
- \_\_\_\_\_ Alimony Received
- \_\_\_\_\_ Pension Income (1099-R)
- \_\_\_\_\_ Prizes & Bonuses
- \_\_\_\_\_ Jury Duty, Fees, Commissions
- \_\_\_\_\_ Unemployment Compensation
- \_\_\_\_\_ Social Security Income (Attach Statement)
- \_\_\_\_\_ Capital Gains/Losses (Attach 1099-B)
- \_\_\_\_\_ Business Income
- \_\_\_\_\_ Rental Income
- \_\_\_\_\_ Partnership & S-Corp Income (K-1'S)
- \_\_\_\_\_ State Tax Refunds
- \_\_\_\_\_ Tax Exempt Interest
- \_\_\_\_\_ Other Income (Tips, Farm, Gambling, Trust)

***PROOF OF HEALTH INSURANCE COVERAGE OR  
EXEMPTION CERTIFICATE MUST BE PROVIDED!***

**TAX DEDUCTIONS & EXPENSES MEDICAL**

- \_\_\_\_\_ Health & Dental Insurance Premiums
- \_\_\_\_\_ Prescription Drugs & Insulin
- \_\_\_\_\_ Hospital & ambulance Charges
- \_\_\_\_\_ Doctor & Nurse Charges
- \_\_\_\_\_ Labs & X-rays
- \_\_\_\_\_ Medical Equipment & Improvements
- \_\_\_\_\_ Glasses, Dentures, Hearing Aids
- \_\_\_\_\_ Mileage, Transp, Lodging
- \_\_\_\_\_ Special Schools, Learning Disabilities
- \_\_\_\_\_ Handicap Schools
- \_\_\_\_\_ Nursing & Domestic Care
- \_\_\_\_\_ Qualified High Deductible Health & HAS
- \_\_\_\_\_ Long Term Health Care Premiums
- \_\_\_\_\_ Other

**TAXES**

- \_\_\_\_\_ State & City Income Taxes
- \_\_\_\_\_ Real Estate Taxes
- \_\_\_\_\_ Ad Valorem Tax (Auto, Boat, Etc)
- \_\_\_\_\_ Personal Property Tax
- \_\_\_\_\_ Sales Tax (Auto, Motor-Home, Boat, Maj. Purch)
- \_\_\_\_\_ Other

**INTEREST**

- \_\_\_\_\_ Home Mortgage (1<sup>st</sup> & 2<sup>nd</sup>)
- \_\_\_\_\_ Points Paid To Refinance Home
- \_\_\_\_\_ Lines of Credit or Home Equity Loans
- \_\_\_\_\_ Investment Interest
- \_\_\_\_\_ Other (Business Interest)

**ironstone**  
Accounting • Tax  
**Tax Preparation Organizer**  
**770-487-9166**

**CONTRIBUTIONS**

**You must provide us receipt/letter for any one donation over \$250**

- \_\_\_\_\_ Church Tithes & Offerings \* Documentation required if over \$250
- \_\_\_\_\_ Cash Contributions \* Documentation required if over \$250
- \_\_\_\_\_ Non-Cash Contributions \* Must provide documentation
- \_\_\_\_\_ Personal Expenses for Charity
- \_\_\_\_\_ Charitable Mileage
- \_\_\_\_\_ Meals
- \_\_\_\_\_ Lodging
- \_\_\_\_\_ Supplies
- \_\_\_\_\_ Foster Parent Expenses (Net of Allowance)
- \_\_\_\_\_ Uniforms for Charitable Work
- \_\_\_\_\_ Property Donated (FMV & Appraisal)
- \_\_\_\_\_ Appraisal Fee
- \_\_\_\_\_ Other

**CASUALTY & THEFT LOSSES (Must be greater than 10% of AGI)**

- \_\_\_\_\_ Car Accident
- \_\_\_\_\_ Storm Damage
- \_\_\_\_\_ Fire or Flood Damage
- \_\_\_\_\_ Theft
- \_\_\_\_\_ Appraisal Fee

**OTHER EXPENSES & TAX ADVANTAGES**

- \_\_\_\_\_ Penalty or Early Withdrawal of Savings
- \_\_\_\_\_ Alimony Paid
- \_\_\_\_\_ IRA, KEOGH, & SEP Contributions
- \_\_\_\_\_ Child Care Expenses

**MISCELLANEOUS EXPENSES**

- \_\_\_\_\_ Employment Agency Fees
- \_\_\_\_\_ Job Hunting Expenses
- \_\_\_\_\_ Professional Fees, Dues, Subscriptions
- \_\_\_\_\_ Tools & Supplies
- \_\_\_\_\_ Uniforms & Special Shoes
- \_\_\_\_\_ Union Dues & Union Expenses
- \_\_\_\_\_ Tax Counseling, Tax Prep
- \_\_\_\_\_ Investment Miles
- \_\_\_\_\_ Safe Deposit Box
- \_\_\_\_\_ Custodial Fees
- \_\_\_\_\_ Publications & Books
- \_\_\_\_\_ Investment Travel
- \_\_\_\_\_ Financial Counseling Fees
- \_\_\_\_\_ Gambling Losses (to extent of winnings)
- \_\_\_\_\_ Expense for Collection of Income
- \_\_\_\_\_ Business Education Expenses

**BUSINESS EXPENSES**

\_\_\_\_\_ Auto Expenses (Need Mileage Log)  
 \_\_\_\_\_ Gas  
 \_\_\_\_\_ Oil & Lube  
 \_\_\_\_\_ Repairs & Maint  
 \_\_\_\_\_ Washing & Waxing  
 \_\_\_\_\_ Insurance  
 \_\_\_\_\_ License & Tag  
 \_\_\_\_\_ Parking & tolls  
 \_\_\_\_\_ Garage Rent  
 \_\_\_\_\_ Tires & Tubes  
 \_\_\_\_\_ Cost of Automobile  
 \_\_\_\_\_ Date in Service  
 \_\_\_\_\_ Interest or Lease Payments  
 \_\_\_\_\_ Accessories  
 \_\_\_\_\_ Auto Club  
 \_\_\_\_\_ Other  
 \_\_\_\_\_ Mileage (Total for the Year)  
 \_\_\_\_\_ Mileage (Total for Business)  
 \_\_\_\_\_ Beginning Odometer Reading  
 \_\_\_\_\_ Ending Odometer Reading  
 \_\_\_\_\_ Business Entertainment  
 \_\_\_\_\_ Meals

\_\_\_\_\_ Cards  
 \_\_\_\_\_ Other  
 \_\_\_\_\_ Business Supplies & Expenses  
 \_\_\_\_\_ Stationary & Supplies  
 \_\_\_\_\_ Postage  
 \_\_\_\_\_ Business Cards  
 \_\_\_\_\_ Professional Dues  
 \_\_\_\_\_ Office Equipment & Fixtures  
 \_\_\_\_\_ Telephone  
 \_\_\_\_\_ Answering Service  
 \_\_\_\_\_ Education  
 \_\_\_\_\_ Laundry (uniforms)  
 \_\_\_\_\_ Bank Fees  
 \_\_\_\_\_ Interest  
 \_\_\_\_\_ Advertising  
 \_\_\_\_\_ Insurance  
 \_\_\_\_\_ Rent  
 \_\_\_\_\_ Licenses  
 \_\_\_\_\_ Sub Contractors / Wages  
 \_\_\_\_\_ Legal & Professional Fees  
 \_\_\_\_\_ Other \_\_\_\_\_  
 \_\_\_\_\_ Other \_\_\_\_\_

**RENTAL PROPERTY EXPENSES**

\_\_\_\_\_ Advertising  
 \_\_\_\_\_ Auto & Travel (Miles)  
 \_\_\_\_\_ Cleaning, Maintenance  
 \_\_\_\_\_ Commissions  
 \_\_\_\_\_ Furniture & Fixtures  
 \_\_\_\_\_ Taxes & Insurance  
 \_\_\_\_\_ Interest  
 \_\_\_\_\_ Management & Assoc. Fees  
 \_\_\_\_\_ Repairs  
 \_\_\_\_\_ Office Supplies  
 \_\_\_\_\_ Telephone  
 \_\_\_\_\_ Trash

**TRAVEL EXPENSES**

\_\_\_\_\_ Fares (planes, taxi, bus, train)  
 \_\_\_\_\_ Lodging  
 \_\_\_\_\_ Meals  
 \_\_\_\_\_ Tips  
 \_\_\_\_\_ Auto Rental  
 \_\_\_\_\_ Travel Equipment  
 \_\_\_\_\_ Other

**Other Information To Prepare Your Tax Returns:**

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**HOME OFFICE SUMMARY \* Exclusively Used For Business**

\_\_\_\_\_ Cost of Home  
 \_\_\_\_\_ Cleaning & Repairs  
 \_\_\_\_\_ Utilities  
 \_\_\_\_\_ Insurance, Taxes & Interest  
 \_\_\_\_\_ Rent  
 \_\_\_\_\_ Security System  
 \_\_\_\_\_ Landscaping  
 \_\_\_\_\_ Home Improvements  
 \_\_\_\_\_ Total SQ of Home  
 \_\_\_\_\_ Total for Office