

A Federally Authorized Tax Practitioner

#### 3277 W Stephens Pl, Chandler, AZ 85226

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You may download your completed organizer to our webportal

## 2016 Tax Organizer

Call to schedule your	Appoint	ment: Day	Dat	te	Time		_ or 🗆	Drop Of	f□	Web Portal
Ta	axpayer	•				S	pouse			
Name				Name						
Name	Bi	rthday		_ SSN Birthday				<u>.</u>		
Occupation		Health Ins □Y	□N	Occupation	on			He	alth	lns □Y □N
Address □t	New addres	ss this year	·		<b>□Yes, Dir</b>	ect De	posit M	y Refund	d to:	
Address New address this year ST_ Zip_ ST_ Zip_ ST_ Xip_				□CK □ Sav						
City	ST	Zip		Rtn #			_ Acct	#		
				Informati	on					
Home Ph	Cell		450	e-mail				5111		
Filing Status □Singl										
Did you and your spouse have I				•	•	•				-
Where was the policy obtained?					-			:xchange)	□Ut	ner
Please Include IR	S torm $\square$	1095-A □1095-B		•	our insurance p	oroviaer				
Name (First Lead)			PEPEN	IDENTS	#84 41			1114. 1	l	F. U.T.
Name (First Last) (exactly as shown on SS of	card)	Soc. Sec. No.	Pola	itionship	#Months in Home	Rietl	ndate	Health I	_	Full Time Student
(exactly as shown on 33 t	Jaiu)	30C. 3ec. No.	Keia	ilionsinp	III HOIIIE	DII (I	luate	All lea	<u> </u>	
								Y	N	□Y □N
									N	□Y □N
								□Y □	Ν	□Y □N
								□Y □	N	□Y □N
TAX DOCUMENTS ENCLOSED										
				# enclosed			Tayı	payer		Spouse
Wages <b>W2</b>	□Em	ployment change this	•	<u> </u>	<u>′</u>		Tux	payor		opousc
Pensions and IRAs 1099R		<u>, , , , , , , , , , , , , , , , , , , </u>	<u>,</u>							
Social Security 1099SSA										
Interest Income 1099INT										
Dividend Income 1099DIV	1									
Sales of Capital – 1099B (		roker statement) □ <b>HU</b>	D1 Sa	le of Real E	Estate					
Unemployment and State T										
Gambling Winnings W2G	(see page 2	2 for gambling losses)								
□Estate, □Trust □S-Corp □	□Partners	ship □PTP <b>K-1</b>								
□Rents, □Royalties □Prizes, □Self Employment – <b>1099MISC</b> (see <i>page 3</i> )										
Mortgage Interest 1098 (see	Mortgage Interest 1098 (see page 2)									
Education Expense 109	98T & □P	roof of Payment /	Stude	nt Loan □1	098E					
Other 1099s:1099A1099C1099SA1099LTC1099Q1099OID										
New Clients: Ple	ease bring	□ copy of last year's to	ax retur	n □Picture I	D. □Social S	ecurity (	Cards for a	all Denende	ents	

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Who can we thank for referring you?

#### **MEDICAL**

#### **TAXES**

AZ Tax Paid	
State Tax Paid	
Real Estate Tax:	
Auto License (VLT)	
Sales Tax paid on Large Purchases	
□Auto □Boat □Airplane □	
Non-taxable income for addl Sales	
Tax deduction □Adoption □Foster	
□Child Support □VA □	
( * New or Changed for AZ State	return)

# ITEMIZED DEDUCTIONS INTEREST

Home Mortgage □1098	
Home Equity Loan □1098	
PMI	
2'nd Home/Motor Home □1098	
Private Mortgage ☐ No 1098	
Name	
SSN	
Address	
Points on Refi.   HUD-1	
Margin Interest □ 1099	_
Other Investment Interest	_

#### **\$ CONTRIBUTIONS \$**

House of Worship	
AZ State Charity Credits: *	
Qual Charitable Org    □ AZ321	
Qual Foster Care Org           AZ352	
Public Schools □ AZ322	
Private Tuition Aid ☐ AZ323	
Military Family Relief □ AZ340	

#### **NON-CASH CONTRIBUTIONS\*\***

1)		
2)		
	Total **	
Charity Miles (# Miles	)	

( \*\* If over \$500 additional detail required)

## (Standard Ded: \$12,600 MFJ \$9,300 HOH \$6,300 Single) ESTIMATED TAXES PAID

Due	Mailed	IRS	Ariz.	
Applied fr	om last yr			
April 15				
June 15				
Sept 15				
Jan 15				

#### **MISCELLANEOUS**

MIGGELL/ (ITEGG	
Investment Acct Fees	
Investment Publications	
Casualty & Theft	
Gambling Losses (<=winnings)	
Tax Prep	
Safety Deposit Box	
Moving Expenses (Job Related)	

#### **EMPLOYEE BUSINESS EXPENSE**

	Taxpayer	Spouse
Educator Expenses		
Job Search		
Union/Profess. Dues		
Uniforms		
Tools & Equip		
Prof. Publications		
Training/Education		
Travel		
Meal & Entertainment		
Auto Miles: Total		
Business		
Commuting		

### SELF EMPLOYMENT INCOME

#### RENTAL S/ROYALTIES

	\$ Amount	\$ Amount
Business Name		
EIN (if available)		
Owner (□Taxpayer □Spouse) □LLC	□T □S □LLC	□T □S □LLC
Home Office? Sq FtOfficeHome	□Y □N	□Y □N
Gross Receipts or Sales □1099MISC	\$	\$
Purchases of Inventory		
EOY Ending Inventory		
Advertising		
Auto - Yr: Make:	# Miles:	# Miles:
Gas, Oil Mtce \$ Total:		
Interest Pd \$ Business:		
License/Reg \$ Commuting:		
Contract Labor(1099Misc Issued □Y □N □NA)		
Insurance (not health)		
Insurance (SE Health)		
Interest (not auto)		
Legal, Professional, Tax Prep		
Office Expense		
Rent – Equipment		
Rent – Building		
Repairs & Maintenance		
Supplies		
Taxes & License		
Travel		
Meals & Entertainment		
Utilities & Telephone		
Wages		
Payroll Taxes		
-		
-		
Business Assets purchased/sold this year?	□ list attached	□ list attached

INEIN I F	LO/NO IALII	<u> </u>	
Property Description:	1	2	3
Gross Rents /Royalties			
Advertising			
Auto (# miles)			
Cleaning			
Commissions			
Insurance – Real Estate			
Insurance – Mortgage (PMI)			
Legal, Professional, Tax Prep			
Management Fees			
Mortgage Interest □1098 □no 1098			
Mortgage Interest □1098 □no 1098			
Other Interest			
Management Fees			
Repairs / Maintenance			
Supplies			
Taxes –Real Estate			
Taxes - Other			
Travel			
Utilities & Telephone			
HOA Fees			
Bank / Collection Fees			
1099Misc Issued?	$\Box Y \Box N \Box NA$		
Improvements made this year?	□ list attached	□ list attached	□ list attached
If new/sold-provide HUD-1 stmt.	□ purch. □sale	□ purch. □sale	□ purch. □sale
	NOTES		

#### GAINS & LOSSES FROM SALES OF REAL ESTATE, PERSONAL PROPERTY & COLLECTIBLES

IRS Requires □Form 1099B Broker Statements for all sales of Stocks, Bonds, and Mutual Funds

Description	Buy Date	Sell Date	Sale Price	Cost

Provide □1099S and HUD-1 closing documents (both □ purchase and □sale) for any Real Estate transactions
OTHER INFORMATION. INCOME. ADJUSTMENTS or CREDITS

OTHER INFORMATION, INCOME, ADJUSTMENTS	or CREDITS	
	Taxpayer	Spouse
Did anyone else other than your spouse or dependents live in your home	□Y □N	□Y □N
Did you have a Foster Child    Caseworker Placement Letter (required)	□Y □N	□Y □N
Did you have a Foreign Financial Account or interest in a Foreign Trust	□Y □N	□Y □N
Did you receive any notices from the □IRS or □AZ DOR □Copy Attached	□Y □N	□Y □N
Did you foreclose or abandon any Real Estate □ Primary Res □ Other	□Y □N	□Y □N
Did you have any debt cancelled or forgiven this year □1099C	□Y □N	□Y □N
Did you gift more than \$14,000 to any one individual	□Y □N	□Y □N
Did you install solar or other energy efficient home improvements	□Y □N	□Y □N
Sharing Economy Income    Airbnb    Lyft    Uber    Other	□Y □N	□Y □N
Tips not Reported to Employer	\$	\$
Taxable Grants, Scholarships or Fellowships	\$	\$
Jury Duty payments received	\$	\$
Alimony Received (Alimony does not include child support)	\$	\$
Alimony Paid to: NameSSN	\$	\$
Address	Ψ	Ψ
IRA Deposit □ done by 12/31 □ will do by 4/15 □ advise me	\$	\$
Roth IRA Deposit □ done by 12/31 □ will do by 4/15 □ advise me	\$	\$
Keogh/SEP Deposit □ done by 12/31 □ will do by 4/15 □ advise me	\$	\$
529 Education Savings Plan Contributions (Now deductible for AZ up to \$4,000)	\$	\$
Health Savings Account □Contributions □Distributions		
College Tuition & Fees Paid □1098T □Proof of Payment (required)	\$	\$
If paid by Student Loan, who's responsible to repay □Parent □Student		
Claimed American Opportunity or Hope Credits before □Y □N # years:		
Student Loan Interest Paid □1098E	\$	\$
□Adoption Credit □Special Needs (□Adoption Order □Subsidy Agreement)		
DAVCADE EVDENCES		

#### **DAYCARE EXPENSES**

Provider	Provider
SSN/EIN Amount Pd \$	SSN/EIN Amount Pd \$
Address Zip	AddressZip
For Dependent(s)	For Dependent(s)

#### OTHER ITEMS or NEXT YEAR CHANGES YOU'D LIKE TO DISCUSS

Thank you for your continued business. We look forward to seeing you soon!

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