

1040

US

Tax Organizer

Thomssen & Thomssen CPA, PC.
 4528 E Camp Lowell Dr
 Tucson, AZ 85712
 Telephone number: 520-319-1913
 Fax number: 520-319-1914
 E-mail address: ktravis@ttcpa-az.com

Tax Return Appointment

Date:
 Time:
 Location:

This tax organizer will assist you in gathering information necessary for the preparation of your tax return. Please enter all pertinent information. If you have attached a government form for an item, check the box and do not enter an amount. In addition to this we will need a copy of your prior year tax return.

CLIENT INFORMATION

Taxpayer

Spouse

First name and initial.....		
Last name.....		
Title/suffix.....		
Social security number....		
Occupation.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
1=blind.....		
Home phone.....		
Work phone.....		
Work extension.....		
Cell phone.....		
E-mail address.....		
Drivers License #.....		
Drivers License State.....		
Issue Date.....		
Expiration Date.....		

Address

Street address.....
 Apartment number.....
 City.....
 State.....
 ZIP code.....

DEPENDENTS

Dependent No.

Dependent No.

First name.....		
Last name.....		
Title/suffix.....		
Date of birth (m/d/y).....		
Date of death (m/d/y).....		
Date of adoption (m/d/y).....		
Social security number....		
Relationship.....		
Months lived at home.....		

WAGES, SALARIES AND TIPS

Employer Name:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

2022 Amount

2021 Amount

Attach Forms W-2	

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Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

INTEREST INCOME

Payer Name:

Form with two input lines for Payer Name

2023 Amount

Attach Forms 1099-INT

DIVIDEND INCOME

Payer Name:

Form with two input lines for Payer Name

Attach Forms 1099-DIV

PENSION AND IRA INCOME

Payer name:

Form with two input lines for Payer name

Attach Forms 1099-R

GAMBLING WINNINGS

Payer name:

Form with two input lines for Payer name

Attach Forms W-2G

Total gambling losses.....

Winnings not reported on Form W-2G.....

Input fields for gambling losses and winnings

OTHER GOVERNMENT FORMS - INCOME

- Form 1099-B - Sales of stock (also include transaction history).....
Form 1099-MISC - Miscellaneous income.....
Form 1099-K - Merchant card and third party network payments.....
Form 1099-S - Sales of real estate (also include closing statements).....

Attach Forms 1099

- Form 1099-G - State tax refunds.....

Attach Forms 1099

Taxpayer:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Attach Forms 1099

Spouse:

- Form SSA-1099 - Social security benefits.....
Form 1099-G - Unemployment compensation.....

Attach Forms 1099

MISCELLANEOUS INCOME

Alimony received.....

Spouse: Alimony received.....

Other:

Form with two input lines for Other

Input fields for Alimony received

Input fields for Other

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Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer:

- Traditional IRA contributions (1=maximum).....
Roth IRA contributions (1=maximum).....
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

2023 Amount

Table with 2 columns for 2023 Amount and 3 rows for retirement contributions.

Spouse:

- Traditional IRA contributions (1=maximum).....
Roth IRA contributions (1=maximum).....
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)

Table with 2 columns for 2023 Amount and 3 rows for spouse retirement contributions.

OTHER GOVERNMENT FORMS - DEDUCTIONS

- Form 1098-E - Student loan interest.....
Form 1098-T - Tuition and related expenses.....

Attach Forms 1098

Table with 2 columns for Attach Forms 1098 and 2 rows.

Affordable Care Act

- Form 1095-A - Health Insurance Marketplace Statement.....

Attach Forms 1095

Table with 2 columns for Attach Forms 1095 and 2 rows.

ADJUSTMENTS TO INCOME

Taxpayer:

- Self-employed health insurance premiums.....
Educator expenses.....
Expenses from rental of personal property.....

Table with 2 columns for 2023 Amount and 3 rows for taxpayer adjustments.

Other adjustments to income:

Table with 2 columns for 2023 Amount and 2 rows for other adjustments.

Alimony Paid - Recipient name & SSN

Table with 2 columns for 2023 Amount and 2 rows for alimony.

Spouse:

- Self-employed health insurance premiums.....
Educator expenses.....
Expenses from rental of personal property.....

Table with 2 columns for 2023 Amount and 3 rows for spouse adjustments.

Other adjustments to income:

Table with 2 columns for 2023 Amount and 2 rows for other adjustments.

Alimony Paid - Recipient name & SSN

Table with 2 columns for 2023 Amount and 2 rows for alimony.

MEDICAL AND DENTAL EXPENSES

- Prescription medicines and drugs.....
Doctors, dentists and nurses.....
Hospitals and nursing homes.....
Insurance premiums.....
Taxpayer: Long-term care premiums.....
Spouse: Long-term care premiums.....
Insurance reimbursements.....
Out-of-pocket lodging and transportation expenses.....
Number of medical miles.....

Table with 2 columns for 2023 Amount and 9 rows for medical and dental expenses.

Other:

Table with 2 columns for 2023 Amount and 2 rows for other medical expenses.

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Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

MEDICAL AND DENTAL EXPENSES (Continued)

Other: _____ 2023 Amount [] []

TAXES PAID

Table with 2 columns: Description (State income taxes, City/local income taxes, etc.) and 2023 Amount.

Other: _____ [] []

Personal property taxes (including automobile fees in some states)..... Attach Tax Notice [] []

INTEREST PAID

Home mortgage interest and points paid Attach Forms 1098 [] []

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee) [] []

Points not reported on Form 1098 [] []

Mortgage insurance premiums on post 12/31/06 contracts..... [] []

Investment interest (interest on margin accounts): [] []

Passive Interest..... [] []

CASH CONTRIBUTIONS

Note: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contributions date(s), and contribution amount(s).

_____ [] []

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Please enter all pertinent 2022 information. If you have attached a government form for an item, check the box and do not enter a 2022 amount.

CASH CONTRIBUTIONS (Continued)

2023 Amount

Volunteer Expenses (out-of-pocket).....
Number of charitable miles.....

Table with 2 columns for 2023 Amount and 2 rows for Volunteer Expenses and Number of charitable miles.

NONCASH CONTRIBUTIONS

Note: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better. In addition, a deduction for any item with minimal monetary value may be denied.

Blank lines for non-cash contributions.

Table with 2 columns for 2023 Amount and 2 rows for non-cash contributions.

MISCELLANEOUS DEDUCTIONS

Union and professional dues.....
Tax return preparation fee.....
Safe deposit box rental.....
Investment expenses.....
Estate tax, section 691(c).....

Table with 2 columns for 2023 Amount and 5 rows for Union dues, Tax fee, Safe deposit, Investment, and Estate tax.

Unreimbursed employee expenses:

Blank line for unreimbursed employee expenses.

Table with 2 columns for 2023 Amount and 2 rows for unreimbursed employee expenses.

Other:

Blank lines for other miscellaneous deductions.

Table with 2 columns for 2023 Amount and 2 rows for other miscellaneous deductions.