

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:

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☐

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:

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☐

Current Year Amount

Attach Forms 1099-INT

DIVIDEND INCOME

Payer Name:

☐
☐

Attach Forms 1099-DIV

PENSION AND IRA INCOME

Payer name:

☐
☐

Attach Forms 1099-R

GAMBLING WINNINGS

Payer name:

☐
☐

Attach Forms W-2G

Total gambling losses.....

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

OTHER GOVERNMENT FORMS - INCOME
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☐
☐
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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

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

Attach Forms 1099

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Taxpayer:

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☐

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:

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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)

Current Year Amount

Spouse:

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

OTHER GOVERNMENT FORMS - DEDUCTIONS

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

Attach Forms 1098

Affordable Care Act

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

Attach Forms 1095

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ADJUSTMENTS TO INCOME

Taxpayer:

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

Other adjustments to income:

Alimony Paid - Recipient name & SSN

Spouse:

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

Other adjustments to income:

Alimony Paid - Recipient name & SSN

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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.....

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.

CASH CONTRIBUTIONS (Continued)**Current Year Amount**

Volunteer Expenses (out-of-pocket).....

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.

MISCELLANEOUS DEDUCTIONS

Union and professional dues.....

Tax return preparation fee.....

Safe deposit box rental.....

Investment expenses.....

Estate tax, section 691(c).....

Unreimbursed employee expenses:

Other:

