

INCOME TAX DATA-ITEMIZER

**NOTE: Immediately Save Income Tax Data Organizer prior to filling in the form
To use the Date Box, Click the drop down arrow to select the date**

Taxpayer's name _____		Soc. Sec. No. _____	
Spouse's name _____		Soc. Sec. No. _____	
Taxpayer's occupation _____	Birthdate _____	Blind? _____	
Spouse's occupation _____	Birthdate _____	Blind? _____	
Address _____			
Phone _____			
Estimated taxes pd. Federal _____	State _____	Local _____	

DEPENDENTS

Name	Soc. Sec. No.	Birthdate	Relationship
1) _____	_____	_____	_____
2) _____	_____	_____	_____
3) _____	_____	_____	_____
4) _____	_____	_____	_____

Income	Support by you	Support by others	Months in your home
1) \$ _____	\$ _____	\$ _____	_____
2) \$ _____	\$ _____	\$ _____	_____
3) \$ _____	\$ _____	\$ _____	_____
4) \$ _____	\$ _____	\$ _____	_____

NOTE: You must provide a Social Security Number for all dependents.

THINGS TO BRING

- | | | | |
|-------------------------------|--|--|---|
| <input type="checkbox"/> W-2s | <input type="checkbox"/> 1099-INTs | <input type="checkbox"/> 1099-DIV | <input type="checkbox"/> Other 1099s |
| <input type="checkbox"/> K-1s | <input type="checkbox"/> Tax forms with labels | <input type="checkbox"/> Property tax bill | <input type="checkbox"/> Last year's tax return |

INTEREST INCOME (if not on 1099-INT)			DIVIDEND INCOME (if not on 1099-DIV)		
H/W/Jt	Payer	\$	H/W/Jt	Payer	\$

RENTAL INCOME AND EXPENSE

Total rent received	_____
Expenses – Taxes	_____
Utilities	_____
Interest	_____
Insurance	_____
Auto mileage	_____
Repairs	_____
Supplies	_____
Other _____	_____
_____	_____
_____	_____
_____	_____

OTHER INCOME

If you have other income, please bring all figures and supporting data. Examples:

Tips	_____
Child care	_____
Pensions / annuities	_____
Jury duty	_____
Strike benefits	_____
Unemployment (1099-G)	_____
Alimony received	_____
Prizes (1099-MISC)	_____
Farming	_____
Self-employment	_____
Partnerships and S corporations	_____
Estates & trusts	_____
Social security benefits	_____
Scholarships & fellowships	_____
Tax refunds	_____
Royalties	_____
Nontaxable income	_____
Gambling	_____
Other _____	_____
_____	_____

SALE OF STOCK OR OTHER PROPERTY	Cost	Sales Price

Please bring supporting documents