

TAX ORGANIZER

LDG INCOME TAX

1396 N. WATERMAN #101

SAN BERNARDINO, CA 92404

Office: (951) 286-0530/ Fax: (866) 647-7130/Cell: (951) 662-0001

APPOINTMENT DATE _____ TIME _____

THINGS TO BRING CHECKLIST

PLEASE BRING WHATEVER APPLIES TO YOU

- _____ 1. SOCIAL SECURITY CARDS AND BIRTH DATES FOR EVERYONE(IF NEW CLIENT)
- _____ 2. ALL COPIES OF W-2'S AND ANY 1099 INCOME REPORTING STATEMENT
- _____ 3. ALL FORMS REPORTING PENSION AND SOCIAL SECURITY BENEFITS
- _____ 4. 1099'S REPORTING INTEREST AND DIVIDEND INCOME
- _____ 5. 1099'S REPORTING UNEMPLOYMENT COMPENSATIONS AND STATE TAX REFUNDS
- _____ 6. 1099'S REPORTING STOCK OR BOND SALES-PURCHASE DATE AND COST
- _____ 7. WORKSHEETS SUMMARIZING BUSINESS OR RENTAL INCOME AND EXPENSES
- _____ 8. ESCROW SETTLEMENT STATEMENT FOR PROPERTY BOUGHT OR SOLD
- _____ 9. STUDENT LOAN INTEREST STATEMENT
- _____ 10. LAST YEAR'S TAX RETURN (IF NEW CLIENT)

ITEMIZED DEDUCTION CHECKLIST

MEDICAL EXPENSES

INSURANCE PREMIUM _____
PRESCRIPTION DRUGS _____
DR. VISITS _____
DENTIST VISITS _____
HOSPITAL EXP _____
GLASSES _____
HEARING AIDS _____
MILEAGE _____

TAXES

PAYMENTS TO STATE _____
REAL ESTATE _____
TIME SHARE _____
PERSONAL PROPERTY _____
AUTO LICENSE _____
AUTO LICENSE _____

INTEREST

HOME MORT #1 _____
HOME MORT#2 _____
IF PAID TO INDIVIDUAL:
NAME _____
ADDRESS _____
SS# _____

CONTRIBUTIONS

BY CASH OR CHECK _____
CHURCH _____
CHURCH _____
PAYROLL DEDUCTS _____
UNITED WAY _____
NON CASH:
GOODWILL _____
SALVATION ARMY _____
VOLUNTEER EXP _____

CREDITS

MISCELLANEOUS

UNION DUES _____
EDUCATION EXT _____
JOB SEEKING EXP _____
PROFESS LIC _____
JOURNALS-MAG _____
SAFETY EQUIPMENT _____
TOOLS/SUPPLIES _____
UNIFORMS _____
BUSINESS MILES _____
BUSINESS TRAVEL _____
BUSINESS MEALS _____
BUSINESS PHONE _____
SAFE DEPOSIT BOX _____
INVESTMENT EXP _____

CHILDCARE

NAME, ADDRESS, PHONE NUMBER, AND SS# OR ID# FOR CHILDCARE PROVIDER

EDUCATION

REGISTRATION & TUITION EXP FOR ANY COLLEGE EDUCATION. 1098-T FORM

ENERGY

PURCHASE RECEIPTS FOR ENERGY EFFICIENT RATED APPLIANCES.