

# 2015 Income Tax

## 2016 Tax Organizer



**SK Financial CPA LLC.**  
 2210 Ashley Oaks Circle  
 Suite 101  
 Wesley Chapel FI 33544  
**813-322-3936**  
[www.skfinancial.com](http://www.skfinancial.com)

Here is your 2015 **Income Tax Organizer**. It will help you **organize your tax information** (and make sure you don't miss any **important deductions**). Whether you do your own tax return or use the services of a CPA firm like ourselves, we hope you'll find it useful.

Our fees are competitive and we'll gladly quote you a fee over the phone **or visit our site at [skfinancial.com/pricing](http://skfinancial.com/pricing)** for a list of pricing. We run an efficient, friendly office — and we're here all year round to answer your questions. If you'd like to schedule an appointment, call and we'll arrange one **immediately**. If you just have a tax question, we'll be happy to handle it **over the phone**.

*Shams Khan CPA*

**813-322-3936**

Shams Khan, CPA, CFP

TAXPAYER INFORMATION		SPOUSE INFORMATION	
First Name	Initial	First Name	Initial
Last Name		Last name	
SSN	DOB	SSN	DOB
Occupation		Occupation	
T: Home	Cell	Home	Cell
Email		Email	
Address		City	State ZIP

FILING STATUS	
<input type="checkbox"/> Single	<input type="checkbox"/> Head of Household
<input type="checkbox"/> Married	<input type="checkbox"/> Married Filing Separately

DEPENDENTS	
Name	
DOB	SSN
Relationship	Mths. Lived @ Home
Name	
DOB	SSN
Relationship	Mths. Live @ Home

	FEDERAL		STATE	
	Date	Amount	Date	Amount
Overpayment				
1 <sup>st</sup> Quarter				
2 <sup>nd</sup> Quarter				
3 <sup>rd</sup> Quarter				
4 <sup>th</sup> Quarter				

REFUND	
Automatic Deposit	<input type="checkbox"/> Yes (attach a VOID check) <input type="checkbox"/> NO



RENTAL INCOME & EXPENSES		
PROPERTY	#1	#2
Location		
<b>INCOME</b>		
Rent Received		
<b>EXPENSES</b>		
Advertising		
Association Dues		
Auto & Travel		
Cleaning/Maintenance		
Insurance		
Labor		
Professional Fees		
Miscellaneous		
Mortgage Interest		
Other Interest		
Supplies		
Taxes		
Telephone		
Utilities		
Repairs		
Improvements:		
Other:		
Business Miles Driven		
Total Miles Driven		

ADJUSTMENTS TO INCOME	
<b>ALIMONY PAID</b>	
Payee	
Payee's SSN	Amount

<b>IRA CONTRIBUTIONS, ETC.</b>		
IRA Deduction		
SIMPLE KEOGH/SEP Plan		
<b>Moving Expense</b>	<b>Miles:</b>	
No of miles from old residence to new workplace		
No of Miles from old residence to new workplace		
<b>Home Office:</b>	<b>SCH C</b>	<b>Form 2106</b>
Total Area of home		
Business Area of home		
Mortgage Interest		
Repairs & Maintenance		
Utilities		
Insurance		

ITEMIZED DEDUCTIONS
<b>MEDICAL &amp; DENTAL EXPENSES</b> – <i>Attach detailed schedules</i>
Prescriptions
Insurance Premiums
Doctors & Dentists
Eyeglasses/Contacts
<b>Vehicle Information:</b> (Sch C or Form 2106)
Description of Vehicle:
Date Put in Service
Total Miles
Business Miles

<b>TAXES PAID</b>
State & Local Income Taxes
Real Estate Taxes – Residence
Real Estate Taxes – Other Property
Auto License: Number of cars
Auto license: Fees Paid
Personal Property Taxes
Other Taxes:

<b>INTEREST PAID</b> – <i>Attach Forms 1098</i>
Home Mortgage (1 <sup>st</sup> )
Home Mortgage (2 <sup>nd</sup> )
Home Mortgage (Equity Line)
Student Loan Interest
Other Interest:

<b>CONTRIBUTIONS</b> – <i>Attach detailed schedules</i>
By Cash or Check
Other than Cash

<b>MISCELLANEOUS DEDUCTIONS</b>			
Union/Professional Dues			
Investment Expense*			
Tax Return Preparation Fees			
Safe Deposit Box Rental			
<b>Unreimbursed Employee Business Expenses Form 2106:</b>			
Travel:		Dues:	
Dues:		Supplies:	
Licenses:		Uniform	
Entertainment:		Meals:	

*"It's not what you earn, it's what you keep!"*

## MISCELLANEOUS QUESTIONS

If any of the following items pertain to you or your spouse for the year 2014, please check the appropriate box and include all pertinent details.

- |     | Yes                      | No                       |  |
|-----|--------------------------|--------------------------|--|
| 1.  | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any interest in, or signature or other authority over a bank, securities, other financial account or trust in a foreign country at any time during the year?                              |
| 2.  | <input type="checkbox"/> | <input type="checkbox"/> | Do you own any foreign assets or have <b>foreign income</b> , pay any foreign taxes, or file any foreign information reporting or tax return forms? Provide details.                                   |
| 3.  | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive an inheritance from a foreign country or a distribution from a foreign trust?  |
| 4.  | <input type="checkbox"/> | <input type="checkbox"/> | Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during the year?   |
| 5.  | <input type="checkbox"/> | <input type="checkbox"/> | Are any of your unmarried children, who might be claimed as dependents, 19 years of age or older?  |
| 6.  | <input type="checkbox"/> | <input type="checkbox"/> | Did any of your children under age 19 or full-time students under age 24 have interest and dividend income of \$950 or more or total investment income of \$1,900 or more?                             |
| 7.  | <input type="checkbox"/> | <input type="checkbox"/> | Do you have a health savings account ( <b>HSA</b> ) or a medical savings account (MSA)?  |
| 8.  | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay an individual or an organization to perform services for the care of a dependent under 13 years old in order to enable you to work or attend school on a full-time basis? Provide details. |
| 9.  | <input type="checkbox"/> | <input type="checkbox"/> | Did you pay an individual to perform in-home health care services for yourself, your spouse, or dependents?  |
| 10. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have expenses for a household employee?  |
| 11. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur employment agency fees or <b>job hunting expenses</b> ?  |
| 12. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any <b>education expense or student loan interest</b> ?   |
| 13. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur <b>moving expenses</b> during the year due to a change of employment?  |
| 14. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any <b>debts</b> , including mortgages, <b>cancelled or forgiven</b> or did you sell or abandon property?   |
| 15. | <input type="checkbox"/> | <input type="checkbox"/> | Does anyone owe you money that has become uncollectible?   |
| 16. | <input type="checkbox"/> | <input type="checkbox"/> | We need copy of voided check for direct deposit or Routing # _____ & Acc # _____   |
| 17. | <input type="checkbox"/> | <input type="checkbox"/> | Did you acquire or dispose of any assets (including real estate) during the year?  |
| 18. | <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell or <b>refinance your principal home</b> or second home, or obtain a home equity loan?   |
| 19. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any <b>energy-efficient improvements</b> or purchases for your home?  |
| 20. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a <b>casualty loss</b> because of damaged or stolen property?  |
| 21. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any gifts either outright or in trust?  |
| 22. | <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any <b>distribution from an IRA</b> or other qualified plan? (Form 1099R)  |
| 23. | <input type="checkbox"/> | <input type="checkbox"/> | If yes, was this rolled over? (Form 1099R)   |
| 24. | <input type="checkbox"/> | <input type="checkbox"/> | Did you open a Roth IRA account or convert an IRA into a Roth IRA?   |
| 25. | <input type="checkbox"/> | <input type="checkbox"/> | Were you or your spouse the beneficiary of COBRA premium assistance?   |
| 26. | <input type="checkbox"/> | <input type="checkbox"/> | Were you granted or did you exercise any stock options?  |
| 27. | <input type="checkbox"/> | <input type="checkbox"/> | Do you want to pay your <b>tax preparation fees from your tax refund</b> ? If yes, we need <b>copy of your driving license</b> .   |

*"It's not what you earn, it's what you keep!"*