

Income Tax Organizer



SK Financial CPA LLC.
2210 Ashley Oaks Circle
Suite 101
Wesley Chapel FL 33544
813-322-3936
www.skfinancial.com

Here is your **Income Tax Organizer**. It will help you **organize your tax information**.

This year we are required to include the driving license information for the taxpayer and his or her spouse on the tax return. So please provide us with **driving license copies** for you and your spouse (if applicable).

Please visit our website at <http://www.skfinancial.com/taxes> for:

1. Tax Organizer.
2. Tax Preparation Fee Calculator - (**Our fees have not changed from last year**)
3. Uploading your documents
4. The "documents needed" list

Shams Khan CPA

Shams Khan, CPA, CFP

813-322-3936

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 st Quarter				
2 nd Quarter				
3 rd Quarter				
4 th Quarter				

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

RENTAL INCOME & EXPENSES (Sch E)		
PROPERTY	#1	#2
Location		
INCOME		
Rent Received		
EXPENSES		
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	
ALIMONY PAID	
Payee	
Payee's SSN	Amount

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

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

TAXES PAID
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:

INTEREST PAID – Attach Forms 1098
Home Mortgage (1 st)
Home Mortgage (2 nd)
Home Mortgage (Equity Line)
Student Loan Interest
Other Interest:

CONTRIBUTIONS – Attach detailed schedules
By Cash or Check
Other than Cash

MISCELLANEOUS DEDUCTIONS			
Union/Professional Dues			
Investment Expense*			
Tax Return Preparation Fees			
Safe Deposit Box Rental			
Unreimbursed Employee Business Expenses Form 2106:			
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, 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 foreign income , 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 (HSA) 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 job hunting expenses ? |
| 12. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any education expense or student loan interest ? |
| 13. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur moving expenses during the year due to a change of employment? |
| 14. | <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts , including mortgages, cancelled or forgiven 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 refinance your principal home or second home, or obtain a home equity loan? |
| 19. | <input type="checkbox"/> | <input type="checkbox"/> | Did you make any energy-efficient improvements or purchases for your home? |
| 20. | <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a casualty loss 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 distribution from an IRA 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 tax preparation fees from your tax refund ? |

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