2006 | 1040 | US | Tax Organizer

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Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2006 tax return. Please enter all pertinent 2006 information.

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		

Address	
In care of	
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)		
Social security number		
Relationship		
Months lived at home		

	Dependent No.	Dependent No.
First name		
Last name		
Title/suffix		
Date of birth (m/d/y)		
Social security number		
Relationship		
Months lived at home		

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Please enter all pertinent 2006 information. If you have attached a government form for an item, check the box and do not enter a 2006 amount.

WAGES, SALARIES AND TIPS

Employer name:	2006 Amount	2005 Amount
☐	Attach Forms W-2	
☐		
☐		
☐		
☐		

INTEREST INCOME

Payer name:	2006 Amount	2005 Amount
☐	Attach Forms 1099-INT	
☐		
☐		
☐		
☐		

DIVIDEND INCOME

Payer name:	2006 Amount	2005 Amount
☐	Attach Forms 1099-DIV	
☐		
☐		
☐		
☐		

PENSIONS, IRA AND GAMBLING INCOME

Payer name:	2006 Amount	2005 Amount
☐	Attach Forms 1099-R & W-2G	
☐		
☐		
☐		
☐		

OTHER GOVERNMENT FORMS - INCOME

	2006 Amount	2005 Amount
☐ Form 1099-B - Sales of stock (also include transaction history)	Attach Forms 1099	
☐ Form 1099-MISC - Miscellaneous income		
☐ Form 1099-S - Sales of real estate (also include closing statements)		
☐ Form 1099-G - State tax refunds	Attach Forms 1099	
Taxpayer:		
☐ Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐ Form 1099-G - Unemployment compensation		
Spouse:		
☐ Form SSA-1099 - Social security benefits	Attach Forms 1099	
☐ Form 1099-G - Unemployment compensation		

MISCELLANEOUS INCOME

	2006 Amount	2005 Amount
Taxpayer: Alimony received		
Spouse: Alimony received		
Other:		

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RETIREMENT PLAN CONTRIBUTIONS

	2006 Amount	2005 Amount
Taxpayer: Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		
Spouse: Traditional IRA contributions (1=maximum)		
Roth IRA contributions (1=maximum)		

OTHER GOVERNMENT FORMS - DEDUCTIONS

	2006 Amount	2005 Amount
☐ Form 1098-E - Student loan interest	Attach Forms 1098	
☐ Form 1098-T - Tuition and related expenses		

ADJUSTMENTS TO INCOME

Taxpayer:

	2006 Amount	2005 Amount
Educator expenses		
Self-employed health insurance premiums		
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)		
Expenses from rental of personal property		
Other adjustments to income:		
Alimony paid - Recipient name & SSN		

Spouse:

	2006 Amount	2005 Amount
Educator expenses		
Self-employed health insurance premiums		
Self-employed SEP, SIMPLE, & qualified plan contributions (1=maximum)		
Expenses from rental of personal property		
Other adjustments to income:		
Alimony paid - Recipient name & SSN		

MEDICAL AND DENTAL EXPENSES

	2006 Amount	2005 Amount
Prescription medicines and drugs		
Doctors, dentists and nurses		
Hospitals and nursing homes		
Insurance premiums		
Long-term care premiums		
Insurance reimbursement		
Out-of-pocket lodging and transportation expenses		
Number of medical miles		
Other:		

TAXES PAID

	2006 Amount	2005 Amount
Real estate taxes - principal residence		
Real estate taxes - property held for investment		
State income taxes - 1/06 payment on 2005 state estimate		
State income taxes - paid with 2005 state extension		
State income taxes - paid with 2005 state return		
State income taxes - paid for prior years and/or to other states		

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TAXES PAID (continued)

	2006 Amount	2005 Amount
City/local income taxes - 1/06 payment on 2005 city/local estimate		
City/local income taxes - paid with 2005 city/local extension		
City/local income taxes - paid with 2005 city/local return		
State and local sales taxes		
Sales taxes paid on vehicles, boats, and aircraft		
Use taxes paid on 2006 purchases		
Use taxes paid on 2005 state return		
Foreign income taxes		
☐ Personal property taxes (including automobile fees in some states)	Attach Tax Notice	

INTEREST PAID

	2006 Amount	2005 Amount
Home mortgage interest and points paid:		
☐	Attach Forms 1098	
☐		
Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):		
Points not reported on Form 1098:		
Investment interest (interest on margin accounts):		
Passive interest		

CASH CONTRIBUTIONS

	2006 Amount	2005 Amount
Volunteer expenses (out-of-pocket)		
Number of charitable miles		
Number of Katrina relief miles		

NONCASH CONTRIBUTIONS

	2006 Amount	2005 Amount

MISCELLANEOUS DEDUCTIONS

	2006 Amount	2005 Amount
Union and professional dues		
Tax return preparation fee		
Safe deposit box rental		
Gambling losses to extent of winnings		
Investment expenses		
Estate tax, section 691(c)		
Unreimbursed employee expenses:		
Other:		

2006	1040	US	Miscellaneous Questions

If any of the following items pertain to you or your spouse for 2006, please check the appropriate box and provide additional information if necessary.

YES	NO	
		PERSONAL INFORMATION
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year?
☐	☐	Could you be claimed as a dependent on another person's tax return for 2006?
		DEPENDENTS
☐	☐	Were there any changes in dependents?
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2005?
☐	☐	Did you have any children under age 18 on January 1, 2007 with interest and dividend income in excess of $850,or total investment income in excess of $1,700?
☐	☐	Has the IRS sent you Form 8836, Qualifying Children Residency Statement?
		INCOME
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
☐	☐	Did you receive any disability income?
☐	☐	Did you have any foreign income or pay any foreign taxes?
		PURCHASES, SALES AND DEBT
☐	☐	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership,S corporation, trust, or REMIC?
☐	☐	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.),or convert any personal assets to business use?
☐	☐	Did you buy or sell any stocks, bonds or other investment property in 2006?
☐	☐	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
☐	☐	Did you have any debts cancelled or forgiven?
☐	☐	Did anyone owe you money which had become uncollectible?

2006	1040	US	Miscellaneous Questions (continued)

If any of the following items pertain to you or your spouse for 2006, please check the appropriate box and provide additional information if necessary.

YES	NO	
		RETIREMENT PLANS
☐	☐	Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
☐	☐	Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
☐	☐	Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA?
		EDUCATION
☐	☐	Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
☐	☐	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
		ITEMIZED DEDUCTIONS
☐	☐	Did you incur a loss because of damaged or stolen property?
☐	☐	Did you work out of town for part of the year?
☐	☐	Did you use your car on the job (other than to and from work)?
		ESTIMATED TAXES
☐	☐	Did you apply an overpayment of 2005 taxes to your 2006 estimated tax (instead of being refunded)?
☐	☐	If you have an overpayment of 2006 taxes, do you want the excess applied to your 2007 estimated tax (instead of being refunded)?
☐	☐	Do you expect your 2007 taxable income and withholdings to be different from 2006?
		MISCELLANEOUS
☐	☐	Do you want to electronically file your tax return?
☐	☐	Do you want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	Does your spouse want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

2006	1040	US	Miscellaneous Questions (continued)

If any of the following items pertain to you or your spouse for 2006, please check the appropriate box and provide additional information if necessary.

YES	NO	MISCELLANEOUS (continued)
☐	☐	Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?
☐	☐	Was your home rented out or used for business?
☐	☐	Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive a HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary?
☐	☐	Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?
☐	☐	Did you incur moving expenses due to a change of employment?
☐	☐	Did you engage the services of any household employees?
☐	☐	Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
☐	☐	Did you or your spouse make any gifts to an individual that total more than $12,000, or any gifts to a trust?
☐	☐	Did you add any energy efficient improvements (insulation systems, exterior windows and doors, metal roofs) to your home in 2006?
☐	☐	Did you purchase a new hybrid vehicle in 2006?
☐	☐	Did you have long-distance telephone service after February 28, 2003 and before August 1, 2006?
☐	☐	If you have an overpayment of taxes, do you want your refund directly deposited to more than one financial account (checking, savings, and retirement)?

TAX RELIEF FOR HURRICANE VICTIMS

YES	NO	TAX RELIEF FOR HURRICANE VICTIMS
☐	☐	Were you in an area impacted by Hurricane Katrina, Rita, or Wilma?
☐	☐	Did you take a distribution from an eligible retirement plan due to economic loss from Hurricane Katrina, Rita, or Wilma?
☐	☐	Did you provide at least 60 consecutive days of housing in your principal residence, free of charge, for a Hurricane Katrina displaced individual?
☐	☐	Did you have any non-business debt that was discharged due to the Hurricane Katrina?
☐	☐	Did you receive any payments due to Hurricane Katrina, Rita, or Wilma? (These payments may or may not be taxable.)