EG TAX

Tax Service Organizer
_______ Tax Year Personal Tax Return

Please call 716-632-7886 or go to egtax.com with any questions or to schedule an appointment.

Personal Information:

Name:____ **Name:**____

Taxpayer	Spouse (If Applicable)
Social Security #	Social Security #
Date of Birth	Date of Birth
Occupation	Occupation
Phone # (Home)	Phone # (Home)
Phone # (Cell)	Phone # (Cell)
Email Address	Email Address
Marital Status	Marital Status

Mailing Address
Address
City
State
Zip Code
Is this a change of address from your prior year's Tax Return? **Yes** **No**

Dependents	#1	#2	#3	#4
Name				
Social Security #				
Date of Birth				
Relationship				
Residence				

Filing Status as of 12/31 prior year (Please Circle One):	Single	Head of House Hold
	Married Filing Joint	Married Filing Separate

Please Bring to Your Appointment:

- Copy of last year's Federal and State Tax Returns
- Proof of identity.
- Proof of birth and relationship for dependents.
- Proof of health insurance for all individuals to be claimed on the tax return.
- Copies of all W2 and 1099 forms.
- Self-employment income and expenses.
- Rental property income and expenses.
- Business income on form K-1.
- Pension, IRA, trust and royalty income.
- Any other income earned and unearned.

Employers for Tax Year _____ (Form W2)	*Taxpayer*

Interest Income for Tax Year _____ (Form 1099-INT)	*Taxpayer*

Dividend Income for Tax Year _____ (Form 1099-DIV)	*Taxpayer*

Brokerage & Investment Income for Tax Year _____ (Form 1099-B)	*Taxpayer*

Retirement (IRA) & Pension Income for Tax Year ____ (Form 1099-R)	*Taxpayer*

Self-Employment Income for Tax Year ____ (Form 1099-MISC)	*Taxpayer*

Rental Income for Tax Year ____ (Property Address)	*Amount*

Misc. Income for Tax Year ____	*Taxpayer*	*Amount*
Alimony Received		
Unemployment Income		
Social Security Income		
Other: ________________________________		
Other: ________________________________		

	Source	***Taxpayer***
Partnership/"S" Corp. Income (Form K-1)		
Trust Income (Form K-1)		
Royalty Income (Form 1099-MISC)		
Jury Duty Income		
Foreign Income		
Tax Refunds		
Gambling Income		
Other Income		

Business Expenses:

	Amount $		***Amount $***
Cost of Goods Sold		Office Expenses	
Inventory (Start of Year)		Rent or Lease	
Inventory (End of Year)		Repairs/Maintenance	
Advertising		Supplies	
Business Miles		Taxes & Licenses	
Insurance		Travel & Meals	
Interest		Utilities	
Legal & Professional		Other: ______________	
		Other: ______________	
Home Office (sq. feet)		Other: ______________	
Home (sq. feet)		Other: ______________	

Rental Expenses: Property Address____

	Amount $		***Amount $***
Advertising		Repairs	
Mileage		Supplies	
Cleaning & Maintenance		Taxes	
Insurance		Utilities	
Legal/Professional Fees		Other: ______________	
Management Fees		Other: ______________	
Mortgage Interest		Other: ______________	

Depreciation(Assets/Capital Improvements):

Description of Purchase	***Date Placed in Service***	***Cost $***

Sale of Assets/Investments:

Description	***Purchase Date***	***Cost***	***Improvements***	***Date Sold***	***Proceeds***

Tuition Expenses (Form 1098-T):

Student	***School***	***Qualified Tuition & Expenses $***

Adjustments & Deductions to Reduce Your Taxes:

Description	***Source***	***Amount $***
Educator Expenses		
Health Savings Account Contribution		
Self Employed Retirement Plan		
Self Employed Health Ins. Premiums		
Alimony Paid – SS#________________		
IRA Deduction (Traditional or Roth)		
Student Loan Interest Paid		
Child and/or Dependent Care Expenses		
Medical & Dental Expenses		
Long Care Ins. Premium		
Sales Tax Paid		

Adjustments & Deductions to Reduce Your Taxes (cont'd):

Description	***Source***	***Amount $***
Real Estate Taxes (Form 1098)		
Other Property Taxes		
Home Mortgage Interest (Form 1098)		
Mortgage Ins. Premiums (Form 1098)		
Charitable Contributions (Cash)		
Charitable Contributions (non-Cash)		
Volunteer Mileage		
Gambling Losses		
Other: ___________________________		
Other: ___________________________		
Other: ___________________________		

Are you participating in the repayment of a First-time Homebuyer Credit? Y N If yes, amount $_________

Additional Information & Questions:

- Please bring this organizer and all supporting tax documents and information to your appointment.
- You may submit this form prior to your appointment by fax 716.631.7516 or email to frontdesk@egtax.com.

Thank you for joining the EG Tax Family!!