



TAX SERVICE

Tax Organizer For Tax Year 2011

Tax Service Organizer

2011 Personal Taxes

Compliments of Philip L. Wiggle, CSE CME CPA

Taxpayer name _____ Social Security # _____

Occupation _____ Date of birth _____

Phone number(s) _____

Email addresses _____

Spouse name _____ Social Security # _____

Occupation _____ Date of birth _____

Mailing address _____

Children under age 19 (or under 24 if a full time student): Additional space on back.

Child's Name:

SS#:

D.O.B:

| Child's Name: | SS#: | D.O.B: |
|---------------|------|--------|
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Please check all that apply to you:

____ Bank interest

____ Dividends

____ Self-employment

____ Social security income

____ Misc. Income

____ Homeowner

____ IRA contributions

____ Business expenses

____ Child care expenses

____ Pension income

____ Alimony

____ Capital gains

____ Unemployment

____ State refund from last year

____ Renter

____ Student loan interest paid

____ Educational expenses

____ Gambling winnings

Questions:

Marital Status or Address *Change* in 2011? Yes () No ()
Filing Status at 12/31/2011? **Circle one >> Single Married (Filing Jointly) Other**

Please bring in:

Copy of last year's Federal and State tax return
All W-2s, 1099s, and a list of any other income (source and amount; when in doubt, list it)
Detail of a nontaxable combat pay
Detail of IRA withdrawals in 2011
A list of all Interest and Dividends received in 2011 (bring in the forms 1099Int and 1099Div)
A list of all rental property owned during 2011 (description, date acquired, date, description, and cost of improvements to the property, and the detail of income and expenses related to it)
A list of all sales of rental property in 2011 (description, purchase price, date acquired, description, and description, cost and date of all improvements to the property, date sold, and selling price)
A list of income and expenses of businesses that you own (For preparation of a Schedule C)
Partnership income and a description of the partnership in which you are a partner
Pensions, trust income, and royalties received
Any Alimony received and/or paid, detail of child support received or paid
Tax refunds received in 2011; list also tax due and paid with the 2005 tax return
Sales of stocks and other investments (date purchased, cost, date sold, net selling price received)
Farm income or loss
Unemployment compensation
Social Security benefits received in 2011

A list of all possible dependents, relationship to you, their ages, whether attending school full-time
Detail of all Medical and Dental expenses, Taxes you paid (Property tax is the big one), Interest you Paid (Mortgage is the big one), Charitable donations, Casualty and Theft Losses (plus detail of insurance reimbursements), Unreimbursed job expenses (travel, union dues, uniforms, education, detail of use of your vehicle for business purposed, etc.), Tax preparation fees paid in 2011, Safe deposit box fee, Investment fees. **Suggestion:** You can find lists of Itemized Deductions listed on the Internet. Go to a search engine (Google etc.) and type in "Itemized Deductions"

Miscellaneous adjustments and deductions to / from income, tax and credits:

Job related moving expenses (not reimbursed by employer)
Penalty of early withdrawal of savings
IRA deduction
Detail of student loan interest paid in 2011
Jury duty pay given to your employer (who continued your regular paycheck)
Detail of child and dependent care expenses
Detail of care of elderly and disabled dependents
Detail of "Residential Energy Expenses" (See my comment with regards to the Internet)

Other detail that may reduce your taxes:

Self employed health insurance premiums
Medical transportation to and from doctors, dentists, hospital (list mileage estimates)
Other medical ... crutches, canes, physical therapy, lab tests, x-rays, MRI, nursing services, hearing aids, eye glasses and contact lenses, seeing eye dogs, ramps construction, railings, and other modifications for disabled dependents

Professional journals, books, magazines related to your employment

Points paid on a mortgage or in refinancing

Mandatory payments to a State Disability fund

Vehicle mileage related to performing charitable activities

Employment agency fees

Is your primary office located in your home? What percentage of your home does it represent?

Does that percentage include that portion of your garage in which you park your “company” car?

What are your home office expenses (only if it is your primary place of business)

If you have a Primary home office; date home was purchased/; cost; cost of any improvements to build an office in your home?

Is your car used in your business? What percentage of the time? How many miles do you drive it on company business?

Job seeking expenses (if within your present field of employment)

Dues to professional organizations (related to your present employment)

Business gifts up to \$25 per customer or client

Broker commissions related to sale or management of property you own

Gambling losses (only to the extent of gambling winnings)

Housekeeper services (to care for a dependent)

Comment & Opinion:

The detail above may seem voluminous but chances are most items will not apply to you. Any that do however, may reduce your taxes and, if you will do a bit of pre-visit detailing, the time required to prepare your tax return and, therefore, the cost of preparing your tax return may be reduced. The “Organizer”, though it may seem a bit overwhelming, is NOT all-inclusive. Our tax code in the United States lengthens most every year, thanks mainly to Special Interest groups and the pressure they may or may not apply on our politicians.

Your Signature: _____

Date: _____