



Tax Service Organizer
2017 Tax Year Personal Taxes
Please call 716-632-7886 with questions
or to schedule an appointment

Taxpayer Name _____ **Social Security #** _____
Occupation _____ **Date of birth** _____
Phone number(s) _____
Email addresses _____

Spouse Name _____ **Social Security #** _____
Occupation _____ **Date of birth** _____
Mailing address _____

Dependents: _____ **Social Security #** _____
_____ **Social Security #** _____
_____ **Social Security#** _____
_____ **Social Security#** _____

Questions:

Marital Status or Address *Change* in 2017? Yes () No ()
Filing Status at 12/31/2017? **Circle one >> Single Married Filing Joint**
Married Filing Separate Head of Household

Please bring in:

- Copy of last year's Federal and State tax returns.
- All W-2s, 1099s, and a list of any other income (source and amount; when in doubt, list it)
- Detail of nontaxable combat pay.
- Detail of IRA distributions and contributions in 2017.
- A list of all Interest and Dividends received in 2017 (bring in the forms 1099-Int and 1099-Div)
- A list of all rental property owned during 2017 (description, date acquired, date, and cost of improvements to the property, and the detail of income and expenses related to the property)
- A list of all sale of rental property in 2017 (description, purchase price, date acquired, 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 (copy of K-1)
- Pensions, trust income, and royalties received.
- Any Alimony received and/or paid.

Tax refunds received in 2017; list also tax paid with the 2016 tax return.
Sale of stocks and other investments. (date purchased, cost, date sold, proceeds)
Farm income or loss.
Unemployment compensation.
Social Security benefits received in 2017.

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 purposes, home office detail, etc.), Tax preparation fees paid in 2016, Safe deposit box fee, Investment fees.

Suggestion: You can find lists of Itemized Deductions 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 (Contributions made in 2017 to Traditional and/or Roth IRAs).
Detail of student loan interest paid in 2017.
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".

Suggestion: You can find lists of Residential Energy Expenses on the Internet. Go to a search engine (Google etc.) and type in "Residential Energy Expenses"

Other details that may reduce your taxes:

Self employed health insurance premiums paid.
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, contact lenses and supplies, service animal and supplies, ramp 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 volunteer activities.
Employment agency fees.
Is your primary office located in your home? What percentage of your home does it represent?
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? How many miles were personal? 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 investments.

Gambling losses (only to the extent of gambling winnings).

Housekeeper services and/or home aide (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. If you will do a bit of pre-appointment recordkeeping, it may reduce the time required to prepare your tax return. The “Organizer”, though it may seem a bit overwhelming, is NOT all-inclusive.

Further assistance for your record keeping needs may be found on our website egtax.com or on our app in the Apple and Android stores under “EG Tax”.