



**Tax Service Organizer**  
**2016 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 2016? Yes ( ) No ( )  
Filing Status at 12/31/2016? **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 nontaxable combat pay
- Detail of IRA withdrawals in 2016
- A list of all Interest and Dividends received in 2016 (bring in the forms 1099-Int and 1099-Div)
- A list of all rental property owned during 2016 (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 2016 (description, purchase price, date acquired, description, and 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, detail of child support received or paid
- Tax refunds received in 2016; list also tax due and paid with the 2015 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 2016

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, 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  
Detail of student loan interest paid in 2016  
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 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 does however, may reduce your taxes and, if you will do a bit of pre-visit detailing, the time required preparing 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.