

PAPA TAX ACCOUNTING

201-505-9199

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INCOME TAX ORGANIZER

New clients should complete all applicable items:

Taxpayer's Name			Social Security	
Spouse's Name			Social Security	
Taxpayer's Occupation	Date of Birth (D.O.B.)		Blind?	
Spouse's Occupation	Date of Birth (D.O.B.)		Blind?	
Address			e-mail:	
City	State	Zip	Home Phone	Work/Cell

DEPENDENT CHILDREN (who lived with you more than 6 months)

1) Name	Social Security	D.O.B.	2) Name	Social Security	D.O.B.
3) Name	Social Security	D.O.B.	4) Name	Social Security	D.O.B.

OTHER DEPENDENTS

1) Name	Social Security	Time at home	Relationship	Income	Support by you	Support by dependent & others
2) Name	Social Security	Time at home	Relationship	Income	Support by you	Support by dependent & others

THINGS TO BRING (if applicable):

- ☐ Last Year's Tax Return (if new client)
☐ W-2 Forms for Wages
☐ 1099-R for Retirement
☐ 1099s for Interest, Dividends, and Other Income
☐ K-1s from Partnerships, Corporations or Estates
☐ Social Security Benefits Statement 1099-SSA
☐ Voided Check for Direct Deposit

☒ ☐
☐ Property Tax Statements 1098
☐ IRA Year-end Statements
☐ 1098 - Mortgage Interest, Tuition, Contributions
☐ Closing Papers for Purchases & Sales, including purchase and sale dates & amounts
☐ All Other Statements Showing Income
☐ Last Pay Stub of the Year

♦RENTAL/SELF-EMPLOYMENT/FARMING

INCOME & EXPENSE:

Property 1: _____ (More than 1 attach sheets)

Total Received: \$. _____

Expenses: Taxes _____
 Utilities _____
 Interest _____
 Insurance _____
 Repairs _____
 Supplies _____
 Equipment _____
 Advertising _____
 Other _____

Business Mileage (on back)

Home Office Information (exclusive use):

Office sq. footage _____ House sq. footage _____
 Utilities paid _____
 Insurance paid _____
 Repairs _____
 Improvements _____
 Identify property and date of improvement _____

OTHER INCOME

- ★ Wages (Forms W-2)Statements
- ★ Interest (Forms 1099-I)Statements
- ★ Dividends (Forms 1099-D)Statements
- Unreported Tips
- ♦ Child Care
- ★ Pensions/Roth Conversions
- Jury Duty
- ★ Gambling Winnings (Forms W-2G)
- ★ Unemployment (1099-G).....Statements
- Alimony Received
- ★ 1099-Misc. (Self Employ/NEC Statements)
- ★ Prizes (1099-Misc.)Statements
- ★ Debt Cancellation (1099-C)Statements
- ★ Partnerships & S Corporations (K-1's)
- ★ Estates & Trusts
- ★ Social Security/RR Retirement (1099-SSA)
- Scholarships & Fellowships
- ★ State Tax Refunds.....
- ★ Royalties
- Disability.....
- Veteran's Payments.....
- ★ Distributions from MSA/HAS

Sale of Stock or Other Property:

Please bring supporting documents. (1099-B) Dates are important!

End of Year Financial Statements from Investment Companies - All pages showing interest, dividends, and transactions.