

PAPA TAX ACCOUNTING

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2024 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.
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's)Statements
- ★ Interest (Forms 1099I)Statements
- ★ Dividends (Forms 1099D)Statements
- ★ Proceeds from Stocks (Forms 1099B) ..Financial Statements
- ♦ 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 (1099C)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.