

CLIENT TAX ORGANIZER FOR PREPARING YOUR TAXES---- FORM 1040

Wage, Salary Income-----W-2
Subcontract Income-----1099-MISC
Interest Income-----1099-INT
Dividend Income-----1099-DIV
Partnership, Trust, Estate Income-----K-1
Investments Sold -----1099-B
Property Sold ----- 1099-S
IRA Withdrawal -----1099-R & 5498
Pension, Annuity Income -----1099-R
Social Security Benefits----- SSA-1099
Railroad Retirement-----RRB-1099
Other Income
Medical/Dental Expenses
Taxes Paid
Interest Expense
Casualty/Theft Loss
Charitable Contributions
Job Related & Moving Expenses
Employment Related Expenses
Child & Dependent Care Expenses
Business Mileage
Business Travel
Investment Related Expenses
Educational Expenses
Other Deductions
Estimated Tax Paid

Call our office for the expanded version of the checklist