

INCOME TAX ORGANIZER

NAME _____ TAX YEAR _____

INCOME

W2 Wage Statement _____
 1099-INT Interest _____
 1099-DIV Dividends _____
 1099-MISC Rent, Prizes, etc. _____
 1099-R Pension, IRA _____
 W2-G Gambling, Lottery _____
 1099-G Unemp/State Refund _____
 1099-Q Qual. Edu. Program _____
 1099-B Investment Sale _____
 1099-S Property Sale _____
 1099-C Cancelled Debt _____

K-1 From:

Partnership _____
 Limited Partnership _____
 S-Corporation _____
 Trust or Estate _____
 SSA-1099 Social Security _____
 RRB-1099 Railroad Retiree _____
 Alimony _____
 Tips _____
 Scholarships _____
 Jury Duty _____
 Investment Transaction _____
 Other Information _____

(i.e: broker statements, broker confirmation slips)

PERSONAL INTEREST

Mortgage (include Form 1098) _____
 Personal Residence Rental
 2nd/Vacation Home Investment
 Mortgage (include Form 1098) _____
 Personal Residence Rental
 2nd/Vacation Home Investment
 Installment Sale _____
 Student Loan (Form 1098-E) _____
 Undergraduate Graduate

Do not include: credit cards or auto loans

TAXES PAID

Real Estate _____
 Personal Property _____
 Sales tax on large purchases _____
 Auto Excise _____
 Other Taxes _____

Do not include: Federal or inheritance taxes.

CHARITABLE GIFTS

*A receipt (or a letter/other written communication) from the qualified organization (containing the donation date, organization name and estimated dollar value) is required for all donations.

Church, Religious Group _____
 Red Cross _____
 United Way _____
 Public Radio, TV _____
 Payroll Deduction _____
 Schools, Hospitals _____

 Non-Cash* _____
 Salvation Army/Goodwill _____
 Vehicle Donation _____
 Supplies for Charity _____
 Food Drives _____
 Mileage (# miles) _____

Do not include: tuition, political contribution, value of time or services, value of blood donated, gifts to lobbying groups, donations to individuals, cost of raffle, bingo, lottery tickets.

*Please see enclosed for rules on Non-Cash charitable donations.

Other Gifts*
 Stock Gifts _____
 RMD gift directly from IRA _____

*Must include Form 8283 and/or letter of acknowledgement.

ALIMONY PAID

Paid to: Amount
 Name: _____
 SSN: _____ \$ _____
 Date of Divorce: _____

DON'T FORGET

Form 1099-HC Health Care Coverage
 Most Massachusetts residents will receive their 1099-HC from their health insurance provider.

Form MA 1099-HC Massachusetts Health Coverage

Form 1095-A
 If you purchased your coverage on the Mass Health Connector or a state exchange, you will also receive a 1095-A

Who is unaffected
 Those enrolled in Medicare, Tricare, or other governmental programs that provided Minimum Essential Coverage.

ESTIMATED TAX PAID

Federal	Amount	Date Paid
Due 4-15	\$ _____	_____
Due 6-15	\$ _____	_____
Due 9-15	\$ _____	_____
Due 1-15	\$ _____	_____
State		
Due 4-15	\$ _____	_____
Due 6-15	\$ _____	_____
Due 9-15	\$ _____	_____
Due 1-15	\$ _____	_____

CHILD CARE EXPENSE

1. Provider Name & Address _____ Amount
 _____ \$ _____

*TIN# _____

2. Provider Name & Address _____ Amount
 _____ \$ _____

*TIN# _____

*Tax Identification Number

WorthTax

SALE OF HOME OR REAL ESTATE

Sale Price _____ **Date** _____

Include: HUD/Settlement Statement (Sale)

Purchase Price _____ **Date** _____

Include: HUD/Settlement Statement (Buy)

Costs & Improvements

- Addition/Build Out _____
- Driveway/Sidewalk _____
- Roof _____
- Kitchen Remodel _____
- Bathroom Remodel _____
- Furnace/Heater _____
- _____
- _____

Other Items

- Energy Credits Claimed for Improvements
- Used as a Home Office
- Used as a Rental Property
- Filed for Bankruptcy in a Prior Year
- Cancelled Debt Income Exclusion/Prior Yr

IRA CONTRIBUTIONS

		Amount
You	<input type="checkbox"/> Traditional IRA	_____
	<input type="checkbox"/> Roth IRA	_____
	<input type="checkbox"/> SEP IRA	_____
	<input type="checkbox"/> Solo 401k	_____
Spouse	<input type="checkbox"/> Traditional IRA	_____
	<input type="checkbox"/> Roth IRA	_____
	<input type="checkbox"/> SEP IRA	_____
	<input type="checkbox"/> Solo 401k	_____

Note: Your IRA deposit can be made until April 15 and still apply to this tax year. SEP IRA and solo 401k contributions may still be made until the due date of the return including extensions.

MISCELLANEOUS DEDUCTIONS

- Legal Fees for Discrimination _____
- Impairment Work Related Exp _____
- Health Saving Account _____
- Casualty Loss/ Property Damage* _____

*Must be from a presidential declared disaster area

EDUCATION EXPENSES

- Student Name _____
- School Name _____
- Tuition & Fees Paid* _____
- Year In School _____
- Reimburesments & Scholarships _____

Include Form 1098-T & proof of payment

*Payments made with student loans are considered tuition payments, grants are not.

ENERGY CREDITS

New Electric/Hybrid Vehicle

Purchase Price _____ **Date** _____

Include: Bill of Sale

Renewable Energy System

- Solar Panels _____
- Solar Powered Water Heaters _____
- Geothermal Heat Pump _____
- _____
- Rebates & Reimbursements _____

Non Business Energy Property

- Insulation _____
- Exterior Windows _____
- Exterior Doors _____
- Water Heater _____
- Furnaces _____
- Hot Water Boiler _____
- _____
- Rebates & Reimbursements _____

STATE

- EZ Pass/Fast Lane (commuting) _____
- T-Pass (commuting) _____
- Lead Paint Removal _____
- Rent Paid _____
- Septic/Title V _____
- 529A Contributions (MEFA) _____

HEALTH CARE

- Health/Dental Insurance _____
- Supplemental Medicare (B) _____
- Prescriptions _____
- Doctor/Copays _____
- X-Ray/MRI/Lab Fees _____
- Nursing Care _____
- Hospital _____
- Drug/Alcohol Treatment _____
- Hearing Aids (batteries) _____
- Eyeglasses, Contacts _____
- Dentist/Orthodontist _____
- Vet Costs for Guide Dogs _____
- Ambulance _____
- Eye Doctor _____
- Medical Mileage (# miles) _____
- Chiropractor _____
- Psychiatrist, Psychologist _____
- Long Term Care Ins. Prem. _____
- _____
- _____

Do not include: cosmetic surgery, life or income insurance, Medicare (A), illegal operations or drugs, non-prescription drugs, funeral, burial, cremation, contact lens supplies.

INVESTMENT INTEREST

- Margin Interest _____
- Investment Property _____
- Other _____