

# INDIVIDUAL INCOME TAX ORGANIZER



## 4 Seasons Income Tax & Bookkeeping Services

Name of Taxpayer:		SS#
Occupation	Address	Are you new to 4 Seasons
Date of Birth	City	State      Zip
Home Phone	County	Work or cell
Name of Spouse:		SS#
Occupation	Date of Birth	Are you new to 4 Seasons
(enter information below only if different from Taxpayer)		
Date of Birth	Address	State      Zip
County	City	Work or cell
If you moved during 2011, enter your previous address		Date of Move

Filing status: \_\_\_\_ Were you divorced or separated during the year? \_\_\_\_ Were there any deaths in the family? \_\_\_\_  
 Have you received any notice from the IRS or state revenue department within the past year? \_\_\_\_\_

Names of dependent children	Social Security #	Date of Birth	Months lived in home	Relationship	College student?

Did any of the children have income above \$850 for the year \_\_\_\_ Are any children disabled? \_\_\_\_  
 Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for this tax year? \_\_\_\_

### Other dependents or people who lived with you

Name	Social Security #	Date of Birth	Relationship	Income
	-- --			
	-- --			
	-- --			
	-- --			

<b>Name of the Bank</b>	
<b>Routing Number</b>	
<b>Account Number</b>	
<b>Account Type</b>	Checking account ____ Savings account ____

# ITEMIZED DEDUCTIONS WORKSHEET

Deductions must exceed \$5,800 single, \$11,600 MFJ, \$8,500 HOH, or \$5,800 MFS to be a tax benefit.

**Medical Expenses.** Must exceed 7.5% of income to be a benefit - include cost for dependents - do not include any expenses that were reimbursed by insurance.

**Charitable Contributions.** If over \$500 in noncash charitable contributions, provide details of contributions. New rules require that the taxpayer retain documentation for all cash contributions.

Dentists	\$	Hospitals	\$
Doctors	\$	Insurance	\$
Equipment	\$	Prescriptions	\$
Eyeglasses	\$	Other	\$

## Casualty and Theft Losses

If you suffered any sudden, unexpected damage or loss of property, or a theft, provide details to your tax preparer.  yes  no

Miscellaneous Itemized Deductions. The following must exceed 2% of income to be a benefit. For use of home, or auto mileage, or other job-related expenses, provide information on a separate sheet.

Were any expenses reimbursed by your employer?  yes  no

Medical miles \_\_\_\_\_ @ 19¢

**Taxes Paid.** Do not include taxes Paid for full or partial business or rental-use Property, including business use of the home.

State withholding	Reported on W-2
State estimated tax - paid in 2011	\$
Real estate tax - residence	\$
Real estate tax - other	\$
Personal property taxes	\$
Property tax refund - 2010	\$
Other	\$
Other	\$
Balance paid in 2011 from prior year returns (do not include interest or penalties)	\$

Dues	\$	Subscriptions	\$
Investment expenses	\$	Supplies	\$
Job education	\$	Tax prep fees	\$
Job seeking	\$	Tools	\$
Legal fees	\$	Uniforms	\$
Licenses	\$	Union dues	\$
Safety equipment	\$	Other	\$

\*Did you keep receipts for sales tax paid during 2011?

\*Did you purchase a car, plane, boat, or home in 2011

Sales Tax Paid \$

**Interest Paid.** Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide forms 1098 or lender information and ID numbers.

Main home	\$	Equity loan	\$
Second home	\$	Equity loan	\$
Points	\$	Investment interest	\$

**Other Miscellaneous Deductions.** The following deductions are not subject to a 2% of income limit.

Gambling losses	\$	Federal estate tax on IRD	\$
Impairment-related expenses	\$	Loss from 2(a) K-1, Form 1065B	\$

Did you pay a mortgage insurance premium when you purchased your home? Amount\$ \_\_\_\_\_ Date financed mortgage: \_\_\_\_\_

## Other Deductions or Questions


- Notes:
- Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.
  - Work clothing is not deductible if adaptable for every day wear, exception for safety equipment such as steel-toe boots.
  - Legal expenses are deductible only if related to producing or collecting taxable income.
  - Expenses to enable physically or mentally impaired individuals to work are generally deductible

## Adjustments Worksheet

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$250 each (\$500 Joint).	\$
Health savings account deduction (HSA).	\$
Self-employed SEP, SIMPLE, and qualified plans. Some contributions for 2011 may be made in 2012.	\$
Penalty on early withdrawal of savings.	\$
IRA deductions. For traditional IRAs. Roth IRAs are not deductible. Some contributions for 2011 may be made in 2012.	\$
Self-employed health insurance deduction. For sole proprietors and partners if not eligible for employer coverage.	\$
Student loan interest deduction. Paid for taxpayers and dependents. Income limits apply.	\$
Tuition and fees deduction. Qualified tuition and fees if not claiming education credits. Income limits apply.	\$
Moving expenses. Job-related move and at least 50 mile increase in commuting distance.	Ask
Business expenses of reservists, performing artists, and fee-based government officials.	Ask