**–***Income Tax Organizer*****

**Dixie Chan Tax Services**
**P.O. Box 1064, Lincoln, CA 95648**
**Office: (916) 521-0967---------FAX: (916) 645-1393**
**Email:** taxranch@yahoo.com

## Income

► W-2s (please include with organizer)

► Interest - (please attach any 1099s and/or list below)

Payer and amount shown

1.

2.

3.

4.

►Dividends- (please attach any 1099s)

Payer and amount shown

1.

2.

3.

►Other Income

Payer and amount shown

1.

2.

►Partnerships- (please attach any K-1s)

Partnership name,

1.

2.

# Deductions

►Medical and Dental list types and amounts (prescriptions, Dr. visits, Dental visits, etc.,)

1.

2.

3.

4.

►Taxes paid,

–1. Real Estate, $______________________

–2. State and local income tax, $______________________

–3. Automobile taxes and fees, $______________________

–4. Other, $______________________

►Mortgage interest / insurance (attach form 1098s),

1.

2.

3.

4.

►Charitable contributions list names and cash amounts or value of non-cash items,

1.

2.

3.

►Other deductions or information,

1.

2.

3.

**Miscellaneous Questions**, (check all that apply)

—Were there any births, adoptions, marriages, divorces, or deaths in your immediate family during the year?

—Are any of your unmarried dependent children 19 years of age or older? If so, were they full time college student(s) last year? YES NO

—Did you receive any income from a business or hobby?

—Were you a renter for at least six months last year?

—Did you or your spouse "rollover" a profit-share or retirement plan distribution into another plan? If yes, enter amount $___________________, and attach Form 1099-R.,

—Did you or your spouse receive any disability income during the year? If yes, enter source and amount $_______________

—Did you purchase, sell, or refinance your principal home or your second home, or make a home equity loan during the year? If yes, please include the escrow papers.

—Did you sell any stocks, bonds, or other investment property during the year? If yes, please include information on the transaction(s).

—Did you pay college expenses last year? If yes, include whom they were for, what the expenses were for, and the amounts.

—Did you incur employee expenses that were not reimbursed by your employer?

—Did you incur moving expenses during the year due to a change in employment?

—Did you incur a loss due to stolen property or other casualties?

—Did you cash in any Series EE U.S. savings bonds?

—Did you make any energy efficient home improvements?

**Additional questions or information:**

## Client Information

**(Include the same information for spouse and children if you are a new client)**

Name(s) ________________________________

Address ________________________________

City, State, Zip ________________________________

Phone ________________________________

Cell ________________________________

Date(s) of Birth ________________________________

E-Mail address ________________________________

Include names and social security numbers and birth dates of all children.

COMMENTS:____________________________________________________________________

____________________________________

For direct deposit please provide your bank's routing and account number, or attach a voided check.

Routing # (found on lower left of your check, usually begins with 12 or 32)__________________

Account # (follows the routing number)__________________________________________

## To pay my tax preparation fee by credit card:

Card number ____________________________________________

Expiration date __________________

Zip code __________________

3-digit code on back of card ___________

Name on card ____________________________________________