

<div>2024 Tax Organizer</div> <div>GARY L. SPOON, Certified Public Accountant</div> <div>6209 Forest Road      Cheverly, MD 20785</div> <div>Phone (301) 322-7290      Fax (301) 322-3043      Email gspoon@spooncpa.com</div>						
NAME: _____			SSN: _____			
SPOUSE: _____			SSN: _____			
ADDRESS: _____			HOME PHONE: _____			
CITY/STATE/ZIP _____			WORK PHONE: _____			
EMAIL ADDRESS: _____						
DEPENDENTS				ESTIMATED TAXES PAID		
Name	SSN	DateBirth	Relationship	Date Paid	Fed Amt	St Amt
W-2 INCOME						
Box 1	Box 2	Box 18				
Employer	Wages	Fed W/H	State W/H			
				T S *		
				T S		
				T S		
				T S		
				T S		
State Tax Refund Received in 2022				Name of State		
Interest Income				Dividend Income		
Company	Amount			Company	Amount	
		T S J *				T S J
		T S J				T S J
		T S J				T S J
		T S J				T S J
		T S J				T S J
		T S J				T S J
Other Income (1099Misc, K1, Alimony)				ADJUSTMENTS TO INCOME		
Source	Amount			Indiv Retirement Account for 2023		
		T S J		Type: Regular, Non-Deductible, Roth		
		T S J		Self EmployedHealth Insurance		
		T S J		Penalty on Early Withdrawals		
		T S J		Alimony Paid Moving Expenses		
		T S J		Other		
		T S J				

# SCHEDULE OF DEDUCTIONS

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## MEDICAL EXPENSES

Medical Insurance

Doctor/Dentists

Prescriptions

Xrays/lab

Nursing Care

Hospital

Rehabilitation

Medical Aids

Transportation

Mileage

Parking, Other

## TAXES

State Tax Withheld

State Tax Paid with 21 Return in 2023

Real Estate Taxes

Personal Property Tax

Other

## INTEREST PAID

Home Mortgage to Bank

Deductible Points

Home Equity Mortgage

Home Mortgage to Individuals

Investment Interest Expense

Educational Loan Interest Expense

## CONTRIBUTIONS

Cash Contributions

Non-Cash (clothes, household Items, etc)

## MISCELLANEOUS

Union Dues

Job Search Expenses

Uniform Purchases

Uniform Cleaning

Small Tools/Safety Equip

Job Supplies/Log Books, Etc

Professional Publications/Dues

Education required to maintain skills

Tax Preparation

Safety Deposit Box

Other

## EMPLOYEE BUSINESS EXPENSE

Vehicle Mileage or Expense

Parking/Tolls/Limo Tips

Lodging

Meals Away from Home

Travel to Second Location (miles)

Gambling Loss to Extent of Winnings

**CHILD CARE (include SSN, Address & Amount)**

**TUITION (Higher Education)**

## Please bring the following to the interview:

Residence Settlement Sheet

Mortgage Interest Statement (1098)

Record of Stock Transactions

Include Purchase Date and Cost

Log of Travel Expenses

Vehicle Purchase Info - If Used in Job

EOY Pay Statement for Union Dues, Etc

W-2 Forms

All 1099's (Interest Dividends, Etc.)

Health Insurance 1095 A/B/C

Last year's Tax Return

## Notes & Comments:

Client Signature

**RENTAL INCOME/EXPENSE**

PROPERTY

A

B

Location

Nr Days Personal Use

Purchase Price

Improvements

Date Purchased

Date First Rented

Rents Received

**EXPENSES**

Advertising

Travel

Cleaning

Maintenance

Commissions

Insurance

Legal/Accounting

Management Fee

Mortgage Interest

Other Interest

Repairs

Supplies

Taxes

Utilities

Condo Fees

Telephone

Pest Control

Other (List)

Depreciation

(I will calculate)

TOTAL EXPENSE

NET INC/LOSS

ALLOWABLE