

ORGANIZER FOR 2009 TAXES

GARY L. SPOON, Certified Public Accountant

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NAME: _____	SSN: _____
SPOUSE: _____	SSN: _____
ADDRESS: _____	HOME PHONE: _____
CITY/STATE/ZIP _____	WORK PHONE: _____

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 2009 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

Other Income (1099Misc, K1, Alimony)

Source	Amount	
		T S J
		T S J
		T S J
		T S J
		T S J
		T S J

ADJUSTMENTS TO INCOME	
Indiv Retirement Account for 2009	
Type: Regular, Non-Deductible, Roth	
Self Employed Health Insurance	
Penalty on Early Withdrawals	
Alimony Paid	
Moving Expenses	
Other	

SCHEDULE OF DEDUCTIONS

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 08 Return in 2009	
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.)
 - 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
