

## TAXCOM, LLC

8352 Six Forks Rd, Ste. 204

Tel (O) 919-870-0931, Cell: 919-699-7049 Fax: 919-870-0688

Website: [www.taxcomllc.com](http://www.taxcomllc.com)

Email: [zebaiye@taxcomllc.com](mailto:zebaiye@taxcomllc.com)

# Tax Organizer

(Check only items that apply to you)

## PERSONNAL INFORMATION FOR EACH FAMILY MEMBER

- ☐ Last Year's Tax Return – **CLIENTS ONLY!!**
- ☐ Social Security Card/ITIN/ATIN
- ☐ Valid Driver's License /Others

## INCOME AND IMPORTANT TAX INFORMATION DOCUMENTS

- ☐ W-2
- ☐ Unemployment Compensation (Form 1098-G)
- ☐ Gambling/Lottery Winnings
- ☐ State Income Tax Refund/Taxes Paid
- ☐ Rental Income & Expenses
- ☐ Self-Employment Income
- ☐ Independent Contractor (Form 1099-MISC)
- ☐ Miscellaneous Income (Form 1099-MISC)
- ☐ Interest Income (Form 1099-INT)
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Stock Sales (Form 1099-B)
- ☐ Mortgage Interest Statement (Form 1098)
- ☐ Higher Education Expenses (Form 1098-T)
- ☐ Pension Income/Distribution (Form 1099-R)
- ☐ Estimated Taxes Paid
- ☐ Social Security/Railroad Retirement
- ☐ IRA or 401(K) Distribution

## DEDUCTIONS/ADJUSTMENT ITEMS

- ☐ Medical Expenses
- ☐ Charitable Contributions
- ☐ Employee Business Expenses
- ☐ Business Mileage (download form)

## **TAXCOM, LLC**

8352 Six Forks Rd, Ste. 204

Tel (O) 919-870-0931, Cell: 919-699-7049 Fax: 919-870-0688

Website: [www.taxcomllc.com](http://www.taxcomllc.com)

Email: [zebaiye@taxcomllc.com](mailto:zebaiye@taxcomllc.com)

☐ Real Estate Taxes/Personal Property Taxes/Mortgage Interest

☐ Gambling Losses

☐ Moving Expenses

☐ Higher Education Expenses (Form 1098-T)

☐ Student Loan Interest Payments (Form 1098-E)

☐ Educator Expenses

☐ Traditional IRA Contributions

### **TAX CREDIT ITEMS**

☐ Child Care Information (Amount paid & Provider's address and EIN/SSN)

☐ Retirement Savings Contributions

☐ Adoption Expenses