

**John E. Baines, P.C.**  
**Tax Organizer**

Taxpayer Information									
Name				Social Security Number			DOB		
Taxpayer									
Spouse									
Child									
Child									
Child									
Address and Status									
Street Address									
City				State		Zip			
Single				Married filing jointly			Married filing separately		
Head of household				Legally Blind			Qualifying Widow(er)		
Please list dates if the following apply:				Divorced			Separated		
Taxpayer Deceased				Spouse Deceased			Dependent Deceased		
Income (please attach W-2's and all 1099 forms)									
	Employer #1		Employer #2		Employer #3		Employer #4		
Taxpayer Wages									
Spouses Wages									
Dependent Wages									
Dependent Wages									
Interest Income					Dividend Income				
Name of Payer		Amount			Name of Payer		Amount		
Medical Expenses Paid					Charitable Contributions				
Insurance Premiums					Organization		Amount		
Medicare Premiums									
Prescription Drugs									
Doctor and Dentist Bills									
Hospital, Nursing Home/Care or Lodging									
Psychological Counseling									
Glasses, Hearing Aids, Batteries					Fair Market Value of Clothing, Furniture				
Lab and X-Ray					Miscellaneous Deductions				
Equipment, Supplies & Rentals					Attorney or Tax Preparation Fees				
Travel for Medical Appointments					Business Gifts				
Parking Fees, Taxi, Bus, Ambulance					Union & Professional Dues				
Insurance Reimbursements					Employment Related		Tuition/Fees		
Other							Education		
Other							Books		
Taxes Paid					Entertainment & Meals				
Real Estate -Home and 2nd Home Only					Gambling Losses				
Investment Property (not rental)					Insurance for Business				
Vehicle License Fees					IRA for Keogh (HR-10) Fees Paid				
Personal Property Tax					Licenses, Fees, Credentials				
State Income Tax					Publications, Books used in Business				
Home Mortgage Interest Paid (attach Form 1098)					Safe Deposit Box				
First Home					Tools, Supplies, Equipment				
Second Home					Uniforms-Purchase or Cleaning				
Home Equity Loan					Other				
Points Paid at Closing					Other				
Refinance Points					Other				

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Investment Interest Paid			Special Information		
Vacant Land			IRA, Keogh or SEP Contributions		
Brokerage Margin Acct			IRA, Keogh or SEP Withdrawals		
Other			IRA, Keogh or SEP Rollovers		
Other			Social Security or RR Retirement		
Other			State Tax Refund		
Office-In-Home Expenses			Alimony Received		
Total Square Feet of Home			Alimony Paid		
Square Feet of Office			SSN of Alimony Recipient		
Storage			Tips Received		
Rent			Unemployment Compensation		
Utilities			Gambling Income (Attach W-2G)		
Taxes			Misc Income		
Insurance			Pension		
Condo or HOA Fees			Other		
Direct Expenses			Self Employed Business Income and Expense		
Maintenance and Repairs			Income		You Spouse
Home Repairs			Gross Income		
Other			Returns and Refunds		
Other			Cost of Inventory at Beginning of Year		
Other			Cost of Goods Purchased		
Business Mileage			Cost of Items for Personal Use		
	Veh. 1	Veh. 2	Cost of Inventory at End of Year		
Make/Model of Vehicle			Expenses		You Spouse
Date Purchased			Advertising		
Total Miles Bus. & Personal			Bank Charges		
Parking Fees			Commissions		
Mileage for Employer			Dues and Publications		
Mileage between Jobs			Entertainment		
From Job to School			Freight		
Job seeking			Gifts		
Investment/Tax Preparation			Insurance		
Rental			Interest		
Self-employed Business			Professional Fees		
Temporary Job Sites			Office Expense		
Avg. round trip to work			Equipment Rental		
Total commuting for year			Rent		
Other			Maintenance and Repairs		
Other			Education		
Other			Supplies		
Business Vehicle Expenses			Payroll		
	You	Spouse	Payroll Taxes		
Gas, Oil & Lubrication			Sales Taxes		
Repairs & Maintenance			Property Taxes		
Tires, Batteries, etc.			Telephone		
Insurance			Utilities		
License and Taxes			Other		
Interest			Other		
Wash and Wax			Other		
Lease Payments			Other		
Other			Other		
Other			Other		
Other			Other		
Other			Other		

