

**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		Moved	
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								Tuition/Fees	
Other					Employment Related			Education	
Other								Books	
Taxes Paid									
Real Estate -Home and 2nd Home Only					Entertainment & Meals				
Investment Property (not rental)					Gambling Losses				
Vehicle License Fees					Insurance for Business				
Personal Property Tax					IRA for Keogh (HR-10) Fees Paid				
State Income Tax					Licenses, Fees, Credentials				
					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		
Home Repairs				You	Spouse
Other			Gross Income		
Other			Returns and Refunds		
Other			Cost of Inventory at Beginning of Year		
			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		
Date Purchased				You	Spouse
Total Miles Bus. & Personal			Advertising		
Parking Fees			Bank Charges		
Mileage for Employer			Commissions		
Mileage between Jobs			Dues and Publications		
From Job to School			Entertainment		
Job seeking			Freight		
Investment/Tax Preparation			Gifts		
Rental			Insurance		
Self-employed Business			Interest		
Temporary Job Sites			Professional Fees		
Avg. round trip to work			Office Expense		
Total commuting for year			Equipment Rental		
Other			Rent		
Other			Maintenance and Repairs		
Other			Education		
Business Vehicle Expenses			Supplies		
	You	Spouse	Payroll		
Gas, Oil & Lubrication			Payroll Taxes		
Repairs & Maintenance			Sales Taxes		
Tires, Batteries, etc.			Property Taxes		
Insurance			Telephone		
License and Taxes			Utilities		
Interest			Other		
Wash and Wax			Other		
Lease Payments			Other		
Other			Other		
Other			Other		
Other			Other		
Other			Other		

