THE COUNTING HOUSE, LLC
616 E. Glenoaks Blvd. Suite 205, Glendale, CA 91207 + (818) 246-9524 + www.countinghouseca.com

INCOME TAX ORGANIZER

PERSONAL INFORMATION

NAME	DATE OF BIRTH	SOCIAL SECURITY NO.	
OCCUPATION	DRIVER LICENSE NO. EXP.	OVER 65? Yes ☐ No ☐	BLIND? Yes ☐ No ☐
ADDRESS			
TEL. (HOME)	TEL. (WORK)	TEL. (CELL)	EMAIL
SPOUSE'S NAME	DATE OF BIRTH	SOCIAL SECURITY NO.	
OCCUPATION	DRIVER LICENSE NO. EXP.	OVER 65? Yes ☐ No ☐	BLIND? Yes ☐ No ☐

DEPENDENT INFORMATION

NAME	DATE OF BIRTH	SOCIAL SECURITY NO.	RELATIONSHIP
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INCOME

	YOU	*SPOUSE*		*YOU*	*SPOUSE*
W-2			Interest		
1099			Dividend		
State Refund			Stocks Sold		
1099-R Lump Sum Distribution			Capital Gain		
W-2 P Pension			Self Employment		
Unemployment			Rental Property		
SSA-1099 Social Security			Royalties		
Alimony			Partnership K-1		
Gambling, Lottery, Awards			"S" Corporation K-1		
Other Income			Other Income		

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ADJUSTMENTS					
	YOU	*SPOUSE*		*YOU*	*SPOUSE*
Educator Expense			Student Loan		
Alimony Paid			IRA		

RETIREMENT ACCOUNT					
	YOU	*SPOUSE*		*YOU*	*SPOUSE*
Individual IRA			Withdraw		
Individual Roth IRA			Rollover		
Individual Keogh					

ESTIMATED TAXES PAID			
	DATE PAID	*FEDERAL*	*STATE*
April			
June			
September			
January			
Credit			

MOVING EXPENSES			
Lodging		Moving Truck Expenses	
Fuel for Moving Truck		Storage Cost	
Miles Driven to New Location		Miles Driven - Old to New Location	

ITEMIZED DEDUCTIONS			
Medical Insurance Premiums		Auto Expenses	
Medical / Dental / Vision Expenses		Business Meals	
Miles Driven for Medical Purposes		Job Hunting	
Real Estate Property Taxes Paid		Tax Preparation & Legal Fees	
Personal Property (DMV Registration)		Professional Dues	
Mortgage Interest		Union Dues	
Points Paid		Uniform & Special Clothing	
Contributions		Miscellaneous	
Casualty and Thefts		Other	

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SELF EMPLOYMENT			
Advertising		Repairs & Maintenance	
Auto Expenses		Taxes & Licenses	
Commissions		Travel & Business Entertainment	
Insurance – Car		Utilities	
Insurance – Liabilities		Telephone	
Insurance – Workers' Compensation		Cellular Phone	
Interest		Payroll	
Professional & Legal Fees		Payroll Taxes	
Office Expenses & Supplies		Outside Service / Contract	
Rent		Contributions	
Rental Equipment or Auto		Materials and Supplies	
Leased Equipment or Auto		Other	

RENTAL INCOME			
PROPERTY A (ADDRESS)		PROPERTY B (ADDRESS)	
PURCHASE DATE	PURCHASE PRICE	PURCHASE DATE	PURCHASE PRICE
Rent Income		Rent Income	
Advertising		Advertising	
Auto Travel		Auto Travel	
Cleaning & Maintenance		Cleaning & Maintenance	
Property Insurance		Property Insurance	
Mortgage Insurance		Mortgage Insurance	
Repairs		Repairs	
Supplies		Supplies	
Utilities		Utilities	
Other		Other	

To the best of my knowledge, all information within this document is true, correct and complete.

Signature Date Signature Date

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INFORMATION, CHECK LIST, WHAT TO BRING

+ **Change of Address** – Is the address you listed, the same address you used on your last year tax return?
+ **W-2 Form** – Provide the entire form, all copies. Do NOT separate W-2s.
+ **1099Misc -** Non-employee compensation income.
  + Did you receive non-employee income for which you did not receive a 1099Misc?
+ **1099-R** – Issued for IRA and various types of pension income.
+ **1099-INT -** Issued by institution where you have interest bearing account.
+ **1099-B** – Issued by Broker if you sold stocks. If so, remember to provide the Purchase Date and the Purchase Price fort the stocks you sold.
+ **1099-G** – Issued by government. Example if you received a refund from the state.
+ **1099-SSA** – Issued by the Social Security Administration.
+ **1098** – Home mortgage interest. If you purchased or refinanced your house, bring closing documents.
+ **Did you move farther than 50 miles last year?** If so, complete the Moving Expenses information.
+ **Partnership "S" Corporation and Trust K-1s** – Provide all K-1s you received.
+ **Prior Year Income Tax Returns -** If our Firm did NOT prepare the prior year tax returns, we must have a complete copy of your previous year returns.

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