

# TAX ORGANIZER TAX YEAR 2009

(Please complete this form & include in your Tax Information.)

## Taxpayer & Spousal Information:

Name	Date of Birth	Social Security #	Occupation

## Filing Status:

(please check)

- Single  
  Married Filing Joint  
  Married Filing Separate  
  Dependent of Another  
  Head of Household  
 Qualifying Widow(er)

## Contact Information:

Home Address			
Home phone number & Cell or Work	Home:		Other:
E-mail address			

## Dependents:

Name	Date of Birth	Social Security #	Relationship

## Income:

(Please include documentation of the following forms of income that apply to you.)

- Salaries, Wages (Attach W-2 & 1099-MISC)  
  Pensions, Annuities, IRA distributions (Attach 1099-R & K-1)  
 Interest received (Attach 1099-INT)  
  Dividends received (Attach 1099-DIV)

## Other Income:

(Please be aware of & include the following forms of misc. income that apply to you.)

- Unemployment Compensation  
  State Tax Refund  
  Social Security Benefits  
 Sale of Stock or Property (purchase information needed)  
  Cancellation of Debt (Attach 1099-C)  
 Misc. Income  
  Alimony Received  
  1099-Misc Forms  
  Tips  
  Winnings

**\*If You are Retired or on Disability-** Did you receive the \$250 Stimulus Refund?    Yes    No

## Adjustments to Income:

- Penalty on Early Withdrawal  
  Alimony Paid- Name \_\_\_\_\_ SS# \_\_\_\_\_ Amount \_\_\_\_\_  
 IRA Contributions (Roth or Trad.)  
  Full-time Teacher- Amount spent on supplies \_\_\_\_\_

## Estimated Income Payments:

	1 <sup>st</sup> QTR (Due 4/09)	2 <sup>nd</sup> QTR (Due 6/09)	3 <sup>rd</sup> QTR (Due 9/09)	4 <sup>th</sup> QTR (Due 1/10)
Date Paid				
Federal Amount	\$	\$	\$	\$
State Amount	\$	\$	\$	\$

## MA Rent Paid:

Landlord's Name	Address	Monthly Rent Paid	Month's Rented
		\$	

\*Please bring in your 1099-HC form stating your healthcare coverage.

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### Medical & Dental:

(Please have amounts totaled)

Health Ins.	Prescriptions	Dr. Appt's	Long-term Ins.	Medical Miles	Hospital	Other (Please Specify)
\$	\$	\$	\$	\$	\$	\$

### Taxes Paid:

Real Estate Tax	Excise Tax	(65 yrs. +) Water & Sewer Bill
\$	\$	\$ Value of House: \$

### Interest Paid:

(If You purchased or refinanced , Please bring in your HUD statement.)

Home Mortgage	Home Equity or 2 <sup>nd</sup> Mortgage	Was home refinanced this year?	If Yes, Were points paid?
\$	\$		

### Contributions:

(Receipts are needed & if amount is over \$500 we need: Name, Address, Date, Description of Item & Value)

Cash or Check (Totaling less than \$500)	Value of Clothing & Household Items (Totaling less than \$500)
\$	\$

### Misc. Deductions:

Union Dues	Prof. Licensing	Tax Prep	Uniform	Uniform Cleaning	Unreimb. Business Exp.	Job Search
\$	\$	\$	\$	\$	\$	\$

Investment Fees	Prof. Supplies	Safe Deposit Box	Prof Tools & Equip	Prof Dues & Pub	Prof Liability Ins.
\$	\$	\$	\$	\$	\$

### Childcare Expenses:

Child's Name	Provider's Name	Address	ID#	Amount
				\$
				\$
				\$

### Educational Expenses:

(Form 1098-T & Yearly Itemized Bill is Required)

Student's Name	Loan Interest	Tuition Expense	Specify- Freshman, Sophomore, Lifetime Learning
	\$	\$	
	\$	\$	

### Fast Lane & MBTA Expenses:

(This is deductible even if you do not itemize)

Name on Account	Amount
	\$
	\$

### Investing:

(Please indicate by checking box if you are interested in additional information)

- Establishing a College Fund for my Child/ Grandchild   
  Establishing an IRA/ Retirement Plan  
 Establishing a Systematic Savings Plan   
  Starting/ Evaluating my Current Life Insurance  
 Long-term Care Insurance Options