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The Barrows Sollenberger Group, PC. & Barrows Wealth Management

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Helping our clients acquire, grow & preserve family wealth in a tax efficient manner.

INCOME TAX ORGANIZER (Part One)

Your tax accountant is prior or the **part organizer** and use it. This will help you **organize your tax information** and make sure you don't miss any important deductions. Whether you do your own tax return or use the services of a CPA firm, we hope you'll find it useful and informative!

Taxpayer Information

First Name	Middle Initial
Last Name	
Social Security #	
Occupation	
Date of Birth	
Street Address	
City	State
County	Zip Code
Home Telephone	
Work Telephone	
Email Address	

Spouse Information

First Name	Middle Initial
Last Name	
Social Security #	
Occupation	
Date of Birth	
Street Address	
City	State
County	Zip Code
Home Telephone	
Work Telephone	
Email Address	

Filing Status

- ☐ Single
- ☐ Married
- ☐ Head of Household
- ☐ Married Filing Separate

Salaries and Wages: Form W-2 Forms

No.	Taxpayer or Spouse	Employer	Box 1	Box 2	Box 3	Box 4
1	T or S					
2	T or S					
3	T or S					
4	T or S					
5	T or S					

No.	Taxpayer or Spouse	Box 5 Fed	Box 6	Box 7	Box 8	Box 9
1	T or S					
2	T or S					
3	T or S					
4	T or S					
5	T or S					

Dependent 1

First Name	
Last Name	Months at Home
Social Security #	Student? ☐ Yes ☐ No
Relationship	
Date of Birth	

Dependent 2

First Name	Middle Initial
Last Name	Months at Home
Social Security #	Student? ☐ Yes ☐ No
Relationship	
Date of Birth	

Dependent 3

First Name	Middle Initial
Last Name	Months at Home
Social Security #	Student? ☐ Yes ☐ No
Relationship	
Date of Birth	

*Include additional dependents in space to the left.

INCOME TAX ORGANIZER (Part Two)

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Other Income

Interest - Attach 1099 Forms:

Payer	Amount
1	$
2	$
3	$
4	$

Dividends - Attach 1099 Forms:

Payer	Total	Capital Gain	Ordinary Dividend
1	$	$	$
2	$	$	$
3	$	$	$
4	$	$	$

State and Local Tax Refunds:

State Tax Refund	Local Tax Refund
$	$

Amount Received: $ Amount Received: $

☐ Check if you did not itemize in prior years

Capital Gains and Losses:

Description	Date Acquired	Date Sold	Sales Price	Cost or Basis
1			$	$
2			$	$
3			$	$

Pensions/IRA Distributions - Attach Form 1099-R's:

Payer	Gross Distribution	Taxable Amount	Federal Withholding	Other Withholdings
1	$	$	$	$
2	$	$	$	$

Alimony Received

Payer: $ Amount Received: $

Payer's Social Security #

Unemployment Received

Taxpayer Amount	$	Tax Withheld	$
Spouse Amount	$	Tax Withheld	$

Social Security Received

Taxpayer Amount	$
Spouse Amount	$

Other Income

Description

INCOME TAX ORGANIZER (Part Three)

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Deductions

Medical and Dental Expenses

Insurance Premiums (Not)	$
Doctors, Dentists, etc.	$
Home Rent	
Dues & Local Tax	$
Real Estate Taxes - Residence	$
Real Estate Taxes - Other Property	$
Other Taxes	$

Interest Paid - Attach 1098 Forms:

Home Mortgage Interest Paid (1st)	$
Home Mortgage Interest Paid (2nd)	$

Contributions - Attach Receipts:

Contributions by Cash or Check	$
Contributions by Other than Cash	$
Unreimbursed Employee Expenses	$

Unreimbursed Employee Expenses: Business Expenses (one part of the home office expenses)

Union/Professional Dues	$
Investment Expense	$
Tax Return Preparation Fees	$
Safe Deposit Box Rental	$

INCOME TAX ORGANIZER (Part Four)

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Business Income

General Information

- ☐ Cash Basis
- ☐ Accrual Basis
- ☐ Tax Year
- ☐ Taxpayer
- ☐ Spouse

Principle Business/Profession	
Business Name	
Business Address	
City, State, Zip	

Income

Gross Receipts or Sales	$
Returns and Allowances	$
Other Income	$
Cost of Goods Sold - if Applicable	
Inventory at Start of the Year	
Inventory at End of the Year	
Purchases	$
Cost of Items for Personal Use	$
Cost of Labor	$
Materials and Supplies	$
Other Costs	$

Expenses

Advertising	$
Car and Truck Expenses*	$
Commissions	$
Employee Benefit Programs	$
Insurance (Other Than Health)	$
Health Insurance Premiums for Self/Family	$
Mortgage Interest (paid to banks, etc.)	$
Other Interest	$
Legal and Professional	$
Office Expenses	$
Pension and Profit Sharing Plans	$
Rent - Vehicles, Machinery, and Equipment	$
Rent - Other Business Property	$
Repairs	$
Supplies	$
Taxes - Real Estate	$
Taxes - Other	$
Travel	$
Meals and Entertainment	$
Utilities	$
Wages	$
Other Expenses	$

*Attach detailed schedule

Business Assets Bought/Sold/Traded

Description	Date Acquired	Cost	Date Sold	Sales Price
		$		$
		$		$
		$		$

Depreciation

Did you have a home office during the year? ☐ Yes ☐ No Sq. ft. of Office Space: sq.ft. Total Sq. ft. of Home: sq.ft.

Home Office Expenses

Type of Expense	Direct Amount	Indirect Amount
Rent	$	$
Utilities	$	$
Insurance	$	$
Janitorial	$	$
Real Estate Taxes Paid	$	$
Repairs and Maintenance	$	$
Mortgage Interest	$	$
Miscellaneous	$	$
Other	$	$

INCOME TAX ORGANIZER (Part Five)

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Rental Income & Expenses

☐ Check if property was purchased/converted to rental in the year.

Property Address	
Property 1	
Property 2	
Property 3	

Property Income/Expenses Detail:

Property	1	2	3
Income: Rents Received	$	$	$
Expenses: Advertising	$	$	$
Auto and Travel	$	$	$
Cleaning/Maintenance	$	$	$
Commissions	$	$	$
Insurance	$	$	$
Legal & Professional Fees	$	$	$
Management Fees	$	$	$
Mortgage Interest	$	$	$
Other Interest	$	$	$
Repairs and Maintenance	$	$	$
Supplies	$	$	$
Taxes	$	$	$
Utilities	$	$	$
Other	$	$	$

Adjustments To Income

Alimony Paid

Payee	
Amount	$
Payee's Social Security #	

Other Adjustments

IRA Deduction	$
Keogh/SEP Deduction	$
Penalty on Early Withdrawal of Savings	$
Student Loan Interest Paid	$
Student Name	
Student Social Security #	
Name of Institution	

Estimated Tax Payments

Federal	Date Paid	Amount Paid
Overpayment - Prior Year		$
1st Quarter - April		$
2nd Quarter - June		$
3rd Quarter - September		$
4th Quarter - January		$

State	Date Paid	Amount Paid
Overpayment - Prior Year		$
1st Quarter - April		$
2nd Quarter - June		$
3rd Quarter - September		$
4th Quarter - January		$

Local	Date Paid	Amount Paid
Overpayment - Prior Year		$
1st Quarter		$
2nd Quarter		$
3rd Quarter		$
4th Quarter		$

INCOME TAX ORGANIZER (Miscellaneous Questions)

Your are invited to print out this organizer (there are six sections) and use it. This will help you **organize your tax information** and make sure you don't miss any important deductions. Whether you do your own tax return or use the services of a CPA firm, we hope you'll find it useful and informative!

Yes	No	
☐	☐	Where there any books, employment or business records, drafts or your personal checkbook destroyed during the year?
☐	☐	Do you have any children under age 18 with interest and dividend income in excess of $850 or total investment income in excess of $1,700?
☐	☐	Are you or your unmarried children, who might be claimed as dependents, 19 years of age or older?
☐	☐	Did you live (claimed as a dependent on another person's tax return)?
☐	☐	Did you or your spouse receive a profit share or retirement plan distribution from a former employer? If yes enter amount $
☐	☐	Did you or your spouse receive any disability income during the year? If yes, enter amount $
☐	☐	Did you purchase, sell, or refinance your principal home or your second home during the year? If yes, please bring your settlement statement.
☐	☐	Did you sell any stocks, bonds, or other investment property during the year? If yes, please bring your records and the date you sold your property.
☐	☐	Did you pay any household employee wages?
☐	☐	Did you receive one you or the job rather than in cash from work?
☐	☐	Does anyone owe you money which has become uncollectible?
☐	☐	Did you receive unemployment compensation during the year? Amount of compensation?
☐	☐	Did you or your spouse work out of town for part of the year?
☐	☐	Did you incur a loss because of damaged or stolen property?
☐	☐	Did you cash in any Series EE U.S. savings bonds issued after 1989?
☐	☐	Did you have any Series E Bonds issued prior to 1980?
☐	☐	Do you or your spouse want to allocate $3 to the Presidential Election Campaign Fund?
☐	☐	Did you have an interest in or signature over a bank or brokerage account in a foreign country, or were you a grantor of or transferor to a foreign trust?
☐	☐	Did you receive an advanced payment (tax rebate) check from the IRS? If so, enter amount $
☐	☐	Were you audited by or did you receive any correspondence from either the Internal Revenue Service or the State taxing agency during the year?
☐	☐	Did you receive a Form K-1 from partnerships, estates, trusts, LLC'S? If so, please attach.
☐	☐	Did you make gifts of more than $12,000 to any individual?
☐	☐	Did you sell your or personal property and will receive payments in a future year?
☐	☐	Did you participate in a medical savings account?
☐	☐	Did you pay for any child care expenses?
☐	☐	Did you pay for higher education expenses for yourself, spouse, or dependents?
☐	☐	Did you make any energy efficient improvements to your personal residence in the current year?
☐	☐	Are you considering retirement in the near term?
☐	☐	Did you engage in any bartering transactions?
☐	☐	Do you have evidence to substantiate your charitable contributions?
☐	☐	Did you contribute to a retirement plan?
☐	☐	Did you make a non-deductible IRA contribution?
☐	☐	Do you own securities?
☐	☐	Do you have any inheritances or a qualified retirement program? If yes, please provide statement.

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