

# Tax Organizer Check List

(Check ALL that apply to you)

## INCOME

1.  W-2 Wages
2.  State Income Tax Refund
3.  Dividends
4.  K1 Distributions (From Corp, Partnerships, Trusts)
5.  Interest Income from a bank
6.  Sale of stocks or bonds
7.  Sale of residence
8.  Rental Income
9.  Pension Income
10.  Social Security Income
11.  Sale of other property
12.  Alimony Received
13.  Disability Income
14.  Unemployment Income
15.  Business Income
16.  Gambling Winnings
17.  Stimulus Refund Payment

## DEDUCTIONS

1.  Student Loan Interest
2.  IRA contributions
3.  Alimony Paid
4.  Teacher Expenses
5.  Medical Expenses
6.  Real Estate Taxes
7.  Vehicle licenses
8.  Mortgage Interest
9.  Cash Contributions
10.  Non-Cash Contributions
11.  Theft/casualty losses
12.  Safe-deposit box
13.  Investment fees
14.  Un-reimbursed Employee Expenses
15.  Tax preparation fees
16.  Union dues
17.  Child care expenses
18.  Dependents
19.  Estimate Tax Payments for current year
20.  Business Deductions
21.  Home Office Deductions
22.  Moving expenses
23.  Adoption Expenses

