

TAX ORGANIZER

MEDICAL EXPENSES

Prescriptions _____
Private Health Insurance _____
Medicare Premiums _____
Doctors _____
Dentists _____
Hospitals/Labs _____
Eyeglasses/Contacts _____
Medical Travel Miles _____
*Medical Deductions Only
Applicable if over 10 % of Gross Income
(7 1/2% if 65 and older)

INTEREST PAID

1st Mortgage _____
2nd Mortgage _____
Home
Equity Loan _____
Mortgage Insurance
Premiums _____

TAXES

Real Estate _____
Auto Tag/Ad Valorem _____

CONTRIBUTIONS

Churches/Synagogues _____
United Way _____
Cancer/Heart _____
Other _____

NON-CASH CONTRIBUTIONS

Clothing, Furniture,
Household Goods
Organizations Name _____
Date ___/___/___ Value \$ _____

CONTACT INFORMATION

Home # _____
Cell # _____
Email Address _____

INT/DIVIDENDS EARNED

INTEREST

DIVIDENDS

EMPLOYEE EXPENSES

* Employee Expenses must exceed 2% of Gross Income in order to be deductible.

Total Miles Driven _____

Business Miles _____

Telephone: Cellular _____

Pay Phones, Long Dist. _____

Union Dues	Continuing Ed
Protective Clothing	Briefcase
Uniforms/Cleaning	Day Timer
Work Tools	Travel
Employment Fees	Office Supplies
Job Search	Publications
Resumes/Copies	Postage
Newspaper Subs	Equipment
Teaching Supplies	Bus. Gifts
Computer (when required by employer)	

MISC. DEDUCTIONS

Safe Deposit Box _____ IRA Fees _____
Investment Expense _____ Fin Pubs _____
Other _____

SEE BACK

Mason's Business Services

P.O. Box 2120 • Covington, Georgia 30015

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www.masonstaxprep.com

*NOTE: Effective 2014, there is a \$15-\$20 charge for all appointments with Mike unless you are 65 or older. There is no charge for appointments with other staff members.

CHILD CARE CREDIT

Providers *or enclose form from Daycare*
Name _____
Address _____
Tax ID# _____
Amount paid _____

EDUCATION CREDITS

College tuition, books, and course-related fees paid out-of-pocket or by student loans \$ _____
The American Opportunity Credit applies to the first four years of college and the Lifetime Learning Credit applies to graduate studies.
**Form 1098-T is required*
**These credits are subject to income limits*

GA EDUCATION TAX CREDITS

Georgia Higher Education 529 Plan Contribution \$ _____
Georgia GOAL Scholarship Contribution: \$ _____ *(must have certificate from the State of GA to take this credit)*

Other Income

Stock and Investment Sales

Date of Purchase and Purchase Price _____

Date of Sale and Sale Price _____
**Form 1099-B is required*

QUARTERLY PAYMENTS

Date Paid	Federal	State
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**If there is ANY confusion about this please send copies of canceled checks.*

TRADITIONAL IRA

\$5,500 Maximum per person over 50 take an additional \$1,000. Contribution is deductible/taxed upon retirement. Must have Earned Income and High Income Individuals are limited.

Taxpayer-amount _____
Spouse -amount _____

QUESTIONS

