

# 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 \_\_\_\_\_  
 \*Please provide form 1098  
 Home  
 Equity Loan \_\_\_\_\_  
 PMI 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

(770) 787-5897

www.masonstaxprep.com

**CHILD CARE CREDIT**

*or enclose form from Daycare*

Providers  
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**

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