

**Mason Tax Services & Bookkeeping Solutions**  
**TAX ORGANIZER**

<b>INCOME</b>		
Type:	Tax Payer	Spouse
W2	_____	_____
Social Security	_____	_____
1099-R	_____	_____
1099-DIV / INT	_____	_____
1099-G	_____	_____
1099-MISC	_____	_____
K1	_____	_____
<b>Interest Expense</b>		
1st Mortgage:	2nd Mortgage:	
New US Mfg. Auto Loan Interest:		
<b>Charitable Contributions</b>		
Cash:	Non-Cash:	
<b>Sale of Assets, Homes, Stocks, Etc. (Attach Documents)</b>		
Description:		
<b>Taxes Paid</b>		
Property Tax	Sales/TAVT/Advoirem:	
<b>Estimated Quarterly Tax Payments</b>		
Date Paid	Federal	State
_____	_____	_____
_____	_____	_____
_____	_____	_____
<b>Medical Expenses (1095-A Is Required for GA Access Insurance)</b>		
Prescriptions	Private Health Insurance	
Doctors	Medicare Premiums	
Dentists	Hospitals & Labs	
Eyeglasses & Contacts	Medical Travel Miles	
<b>1099-NEC - Self Employment Business Income &amp; Expenses</b>		
Business Name / Services:		
Owner:	Income / Revenue:	
Expenses:		
Advertising	Professional Fees	
Bank Fees	Rent	
Commissions	Rental Equipment	
Contract Labor	Repairs / Main	
Dues & Subs	Supplies	
Insurance	Taxes / Licenses	
Interest	Telephone/Internet	
Materials	Travel	
Meals 50%	Office	
Other (Explain):		
Home Office:	Total Sq. Ft:	Sq. Ft. Used for Office:
Total Miles Driven		
Business Miles	= .70/Mile	Net Profit/Loss:

## **IRS and State Tax Electronic Payments**

We recommend that you make your tax payments online. Creating an account is safe, simple and provides an electronic confirmation of your payment.

### **Visit [www.irs.gov](http://www.irs.gov)**

#### **Click on "Make a Payment"**

You have the option of creating an account or making a one-time direct payment without registering using your bank account. (Click on "Pay Now with Direct Pay") You can also make a payment with a debit or credit card for a small fee (Click on "Pay Now by Card").

#### **Click on "Make a Payment"**

Complete the Questions:

Reason for Payment: choose from list (Balance Due)

Apply Payment to: choose from list (Income Tax – Form 1040)

Tax Period for Payment: (Example: 2024) Unless you are paying for a prior year

Click Continue:

Click Continue:

Tax Year for Verification: Choose a year that has already been filed. (Example: 2023:)

Filing Status: Choose from the list

Complete the rest of your personal information.

Click the box before the statement "I accept the Privacy Act...."

Click Continue

Once you are verified you'll continue to the payment information form.

### **Visit [gtc.dor.ga.gov](http://gtc.dor.ga.gov)**

In the "Tasks" box click on "Make a Quick Payment"

Click "Next" on bottom left.

Click the box "Individual", Select ID Type "Social Security #", Click "Next"

Answer Questions: Do you have a payment #? "No", Fill in your Social Security # Twice, then click "Next"

Enter Your Payor Information:

Select Filing Frequency: "Individual Annual Income"

Select Filing Period for Payment: (Example: 12/31/2023) Unless you are paying for a prior year

Click "Next"

Payment Channel: Fill in payment information.

Payment: Fill in date and amount you are paying

Click "Next"

**PRINT or SAVE YOUR CONFIRMATION!!**