

Mason Tax Services & Bookkeeping Solutions

TAX ORGANIZER

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

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

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!!