

# Tax Organizer For 2015 Income Tax Return

**Prepared For:**

**NAME:**

**Prepared By:**

**TAXES DONE RIGHT**

**NEW YORK CITY, NY 11237-4007**

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This Tax Organizer can be used to help identify the information needed to prepare your 2015 income tax return.

Enter your 2015 information and if you need additional space, enclose a separate sheet with the details. If available, your prior year information has been included for you to use as a reference. You do not need to make 2014 entries.

Please return this organizer along with all Form W-2's, 1099's, expenses, and any other information you feel will assist with the preparation of your income tax return.

If you have any questions, please feel free to contact us at **(917) 202-7476**.

**PLEASE LET ME KNOW IF YOU HAVE MEDICAL INSURANCE AND WHERE IT IS FROM (i.e. EMPLOYER, MARKET PLACE, SELF COVERED), HOW MUCH YOUR PREMIUMS ARE, AND WHO IT COVERS IN YOUR HOUSEHOLD.**

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## PERSONAL INFORMATION

Taxpayer's name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Spouse's name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Home Address \_\_\_\_\_ Apartment Number \_\_\_\_\_

City or town \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ County \_\_\_\_\_

Telephone #1 \_\_\_\_\_ Telephone #2 \_\_\_\_\_

E-mail Address \_\_\_\_\_ (now needed)

WHO	DATE OF BIRTH	OCCUPATION	BLIND	DISABLED	HEALTH INSURANCE	COLLEGE OR CHILDCARE	DATE OF DEATH
TAXPAYER							
SPOUSE							
DEPENDENT #1							
DEPENDENT #2							
DEPENDENT #3							

## FILING STATUS

Indicate your filing status to be used on our 2015 income tax return:

\_\_\_\_\_ Single \_\_\_\_\_ Check if parent (or someone else) can claim you as a dependent on their return

\_\_\_\_\_ Married Filing Joint

\_\_\_\_\_ Married Filing Separate \_\_\_\_\_ Check if you lived apart from your spouse for all of 2005

\_\_\_\_\_ Head of Household (May be used if unmarried but j provided over half the cost of keeping up a home for your dependent or unmarried child).

If the person is a child but not a dependent; Name \_\_\_\_\_ SSN \_\_\_\_\_

\_\_\_\_\_ Qualifying Widow(er) (May be used your spouse died in 2013 OR 2014 and you had a child living with you whom you can claim as a dependent) Year spouse died \_\_\_\_\_

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## OTHER INFORMATION

Do you wish to contribute \$3 to the Presidential Election campaign? (This will not affect your refund or balance due)  
Taxpayer  Yes  No      Spouse  Yes  No

Do you want to allow the paid preparer to discuss your return with the IRS?  Yes  No

### Direct Deposit Information

Name of Financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_

Account Number \_\_\_\_\_

Checking Account     Savings Account

## DEPENDENTS

Generally you can claim an individual as a dependent if they meet all of the following:

- was either your relative or lived in your home as a family member all year
- was a U.S. citizen or a U.S. legal resident
- you provided over half of the person's total support in 2008
- person's gross income was less than \$4,800 (gross income can be over \$4,800 if your child was either under age 19 at the end of 2008 or under age 24 at the end of 2008 and was a student)

DEPENDENT'S FIRST NAME	DEPENDENT'S LAST NAME	SOCIAL SECURITY NUMBER	RELATIONSHIP	BIRTHDAY	NUMBER OF MONTHS LIVED WITH YOU	CHILDCARE OR COLLEGE PAID IN 2015

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## MISCELLANEOUS QUESTIONS

Complete the following questions answer Yes or No.  
If your answer to any question below is Yes enclose supporting documentation.

1. Did you or your spouse have income during the tax year that was not reported on a W2? \_\_\_\_\_
2. Did you or your spouse receive social security payments during the tax year? \_\_\_\_\_
3. Did you receive Unemployment payments during the tax year? \_\_\_\_\_
4. Did you receive any notices or correspondence from the IRS or state agency during 2015? \_\_\_\_\_
5. Did you receive interest from bank accounts or from sell of stock or bonds? \_\_\_\_\_
6. Did you earn any foreign income or have any foreign taxes paid during 2015? \_\_\_\_\_
7. Did you own your own home during the tax year? \_\_\_\_\_
8. Did you refinance a mortgage during 2015? \_\_\_\_\_
9. Did you pay a household employee cash wages of \$1,400 or more during 2015? \_\_\_\_\_
10. Did you sell your home during 2015? \_\_\_\_\_
11. Did you use any special fuels for farming purposes or other non-highway uses? \_\_\_\_\_
12. Did you receive any unreported tip income during 2015? \_\_\_\_\_
13. Did you pay for childcare during the tax year that allowed you to work? \_\_\_\_\_
14. If yes, do you have the address and tax identification or social security # for the provider? \_\_\_\_\_
15. If any of your children are required to file a return, do you elect to report your child's interest and dividends on your return? \_\_\_\_\_
16. Do you have any children under the age of 14 at the end of 2015 who had unearned income greater than \$1800? \_\_\_\_\_
17. Did you pay any expenses related to the adoption of an eligible child? \_\_\_\_\_
18. Did you or anyone in your family attend college or vocational school during the tax year? \_\_\_\_\_
19. Did you or anyone in your family pay student loans interest? \_\_\_\_\_
20. Have you ever had your Earned Income Credit disallowed by the IRS? \_\_\_\_\_
21. Do you have Health Insurance? \_\_\_\_\_
22. Would you send a copy of your prior year's tax return? \_\_\_\_\_





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