

2003 Tax Organizer

Personal Data

Taxpayer Information

Last name
 First name
 Middle Initial Suffix
 Social security number
 Date of birth
 Occupation
 Work phone Ext ..
 Cell phone
 E-mail address

Spouse Information

Last name
 First name
 Middle Initial Suffix
 Social security number
 Date of birth
 Occupation
 Work phone Ext ..
 Cell phone
 E-mail address

Address Information

Address Apartment number
 City State ZIP Code
 Home phone Fax number

Dependent Information

First name Last name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived with Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Student First Name	MI	Suffix	Student Last Name	Social Security Number	Qualified Expenses

For each student: 1) First/second year of post-secondary education? 2) At least 1/2 time? 3) Earning degree or other credential? 4) No drug offense? Attach details of the qualified education expenses.

Student Loan Interest Paid

Enter the total interest you paid in 2003 on qualified student loans

2003 Income

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name	Last Year Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	Last Year Amount
_____	_____
_____	_____
_____	_____

Attach Form(s) SSA-1099 – Social Security Benefits

Taxpayer

Spouse

Social Security Benefits from Form SSA-1099	_____	_____
Railroad Retirement Benefits from Form RRB-1099	_____	_____
Medicare B premiums withheld	_____	_____

Attach Form(s) 1099-MISC – Miscellaneous Income

1099-MISC Payer Name

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name	Last Year Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name	Last Year Amount
_____	_____
_____	_____
_____	_____
_____	_____

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

Taxpayer

Spouse

Traditional IRA contributions made for 2003	_____	_____
Roth IRA contributions made for 2003	_____	_____
SEP, Keogh, Individual 401(k) or SIMPLE Contributions	_____	_____

2003 Deductions

Medical and Dental Expenses	2003 Amount	Last Year Amount
Prescription medications		
Health insurance premiums		
Qualified long-term care premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		
Taxes	2003 Amount	Last Year Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		
Interest Expenses		
Home mortgage interest paid – Attach Form(s) 1098.		
Lender's Name	2003 Amount	Last Year Amount
Points paid on loan to buy, build or improve main home		
Lender's Name	2003 Amount	
Cash Charitable Contributions		
Charitable Organization	2003 Amount	Last Year Amount
Noncash Charitable Contributions		
Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property.		
Miscellaneous Deductions	2003 Amount	Last Year Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		

2003 Questions

	Yes	No
1 Enter the amount, if any, of the 2003 advance child tax credit (before offset)		
2 Did your marital status change during 2003?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , explain: _____		
3 Were you or your spouse permanently and totally disabled in 2003?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you have dependents who must file?	<input type="checkbox"/>	<input type="checkbox"/>
5 Do you have children under age 14 with investment income greater than \$1,500?	<input type="checkbox"/>	<input type="checkbox"/>
6 Did you provide over half the support for any other person during 2003?	<input type="checkbox"/>	<input type="checkbox"/>
7 Did you incur adoption expenses during 2003?	<input type="checkbox"/>	<input type="checkbox"/>
8 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?	<input type="checkbox"/>	<input type="checkbox"/>
9 Did you receive any disability payments in 2003?	<input type="checkbox"/>	<input type="checkbox"/>
10 Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input type="checkbox"/>
11 Did you buy, sell or refinance a principal residence or other real property in 2003?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , attach closing or escrow statements.		
12 Did you incur any casualty or theft losses during 2003?	<input type="checkbox"/>	<input type="checkbox"/>
13 Did you incur any non-business bad debts?	<input type="checkbox"/>	<input type="checkbox"/>
14 Did you pay any individual for domestic services in 2003?	<input type="checkbox"/>	<input type="checkbox"/>
15 Did you buy or sell any stocks or bonds in 2003?	<input type="checkbox"/>	<input type="checkbox"/>
16 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? ..	<input type="checkbox"/>	<input type="checkbox"/>
17 Did you incur any moving expenses? If yes , attach details	<input type="checkbox"/>	<input type="checkbox"/>
18 Did you receive any income not included in this Tax Organizer?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please attach information.		
19 Do you expect your income and deductions in 2004 to be the same as 2003?	<input type="checkbox"/>	<input type="checkbox"/>
If no , attach explanation of changes expected.		
20 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
	Taxpayer	Spouse
21 Enter your state of residence		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?	<input type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit?	<input type="checkbox"/>	<input type="checkbox"/>
If yes , please provide a voided check (not a deposit slip).		
What type of account is this?	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>

Estimated Tax Paid

Federal		State			Local or Second State		
Date	Amount	Date	Amount	ID	Date	Amount	ID

Additional Information (Enter any additional information here and attach any documents.)
