



Tax Service Organizer 2018 Tax Year Personal Tax Return

Please call 716-632-7886 or go to egtax.com with any questions or to schedule an appointment.

Personal Information:

Taxpayer	Spouse (If Applicable)
Social Security #	Social Security #
Date of Birth	Date of Birth
Occupation	Occupation
Phone # (Home)	Phone # (Home)
Phone # (Cell)	Phone # (Cell)
Email Address	Email Address
Marital Status 2018	Marital Status 2018

Mailing Address
Address
City
State
Zip Code
<i>Is this a change of address from your 2017 Tax Return?</i> Yes No

Dependents	#1	#2	#3	#4
Name				
Social Security #				
Date of Birth				
Relationship				
Residence				

Filing Status as of 12/31/2018 (Please Circle One):	Single	Head of House Hold
	Married Filing Joint	Married Filing Separate

Please Bring to Your Appointment:

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="radio"/> Copy of last year’s Federal and State Tax Returns <input type="radio"/> Proof of identity. <input type="radio"/> Proof of birth and relationship for dependents. <input type="radio"/> Proof of health insurance for all individuals to be claimed on the tax return. | <ul style="list-style-type: none"> <input type="radio"/> Copies of all W2 and 1099 forms. <input type="radio"/> Self-employment income and expenses. <input type="radio"/> Rental property income and expenses. <input type="radio"/> Business income on form K-1. <input type="radio"/> Pension, IRA, trust and royalty income. <input type="radio"/> Any other income earned and unearned. |
|--|--|



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<i>Employers for Tax Year 2018 (Form W2)</i>	<i>Taxpayer</i>

<i>Interest Income for Tax Year 2018 (Form 1099-INT)</i>	<i>Taxpayer</i>

<i>Dividend Income for Tax Year 2018 (Form 1099-DIV)</i>	<i>Taxpayer</i>

<i>Brokerage & Investment Income for Tax Year 2018 (Form 1099-B)</i>	<i>Taxpayer</i>



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<i>Retirement (IRA) & Pension Income for Tax Year 2018 (Form 1099-R)</i>	<i>Taxpayer</i>

<i>Self-Employment Income for Tax Year 2018 (Form 1099-MISC)</i>	<i>Taxpayer</i>

<i>Rental Income for Tax Year 2018 (Property Address)</i>	<i>Amount</i>

<i>Misc. Income for Tax Year 2018</i>	<i>Taxpayer</i>	<i>Amount</i>
Alimony Received		
Unemployment Income		
Social Security Income		
Other: _____		
Other: _____		



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	<i>Source</i>	<i>Taxpayer</i>
Partnership/"S" Corp. Income (Form K-1)		
Trust Income (Form K-1)		
Royalty Income (Form 1099-MISC)		
Jury Duty Income		
Foreign Income		
Tax Refunds		
Gambling Income		
Other Income		

Business Expenses:

	<i>Amount \$</i>		<i>Amount \$</i>
Cost of Goods Sold		Office Expenses	
Inventory (Start of Year)		Rent or Lease	
Inventory (End of Year)		Repairs/Maintenance	
Advertising		Supplies	
Business Miles		Taxes & Licenses	
Insurance		Travel & Meals	
Interest		Utilities	
Legal & Professional		Other: _____	
		Other: _____	
Home Office (sq. feet)		Other: _____	
Home (sq. feet)		Other: _____	

Rental Expenses: Property Address _____

	<i>Amount \$</i>		<i>Amount \$</i>
Advertising		Repairs	
Mileage		Supplies	
Cleaning & Maintenance		Taxes	
Insurance		Utilities	
Legal/Professional Fees		Other: _____	
Management Fees		Other: _____	
Mortgage Interest		Other: _____	

Depreciation(Assets/Capital Improvements):

<i>Description of Purchase</i>	<i>Date Placed in Service</i>	<i>Cost \$</i>



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Sale of Assets/Investments:

<i>Description</i>	<i>Purchase Date</i>	<i>Cost</i>	<i>Improvements</i>	<i>Date Sold</i>	<i>Proceeds</i>

Tuition Expenses (Form 1098-T):

<i>Student</i>	<i>School</i>	<i>Qualified Tuition & Expenses \$</i>

Adjustments & Deductions to Reduce Your Taxes:

<i>Description</i>	<i>Source</i>	<i>Amount \$</i>
Educator Expenses		
Health Savings Account Contribution		
Self Employed Retirement Plan		
Self Employed Health Ins. Premiums		
Alimony Paid – SS# _____		
IRA Deduction (Traditional or Roth)		
Student Loan Interest Paid		
Child and/or Dependent Care Expenses		
Medical & Dental Expenses		
Long Care Ins. Premium		
Sales Tax Paid		



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Adjustments & Deductions to Reduce Your Taxes (cont'd):

<i>Description</i>	<i>Source</i>	<i>Amount \$</i>
Real Estate Taxes (Form 1098)		
Other Property Taxes		
Home Mortgage Interest (Form 1098)		
Mortgage Ins. Premiums (Form 1098)		
Charitable Contributions (Cash)		
Charitable Contributions (non-Cash)		
Volunteer Mileage		
Gambling Losses		
Other: _____		
Other: _____		
Other: _____		

Are you participating in the repayment of a First-time Homebuyer Credit? Y N If yes, amount \$ _____

Additional Information & Questions:

- Please bring this organizer and all supporting tax documents and information to your appointment.
- You may submit this form prior to your appointment by fax 716.631.7516 or email to frontdesk@egtax.com.

Thank you for joining the EG Tax Family!!