

TAX RETURN ORGANIZER

Mira Tax & Financial Solutions

MiraTaxSolutions.com

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Taxpayer Name: _____
 DOB: _____ Social Security #: _____
 Address: _____
 State: _____ Zip: _____
 Home Ph: _____ Mobile: _____

INCOME	ANNUAL TOTAL	SPOUSE	ANNUAL TOTAL
W-2 Forms		First Name	
1099 Forms		Middle	
Interest from Banks etc.		Last Name	
Dividends		Date of Birth	
Taxable (State) Refunds		Social Security Number	
Alimony Received		Street Address	
IRA Distribution		City, State, and Zip Code	
Stock Sales (Broker House Year End)			
Pensions		DEPENDENTS	
Real Estate Rental Income		First and Last Name	
Unemployment Compensation		Date of Birth	
Social Security Benefits		Social Security Number	
Other Income		Relation (son, daughter, niece, etc)	
		Child Care Expenses	
DEDUCTIONS		Name of Child Care Provider	
IRA Contributions		Address of Provider	
Student Loan Interest Paid		Phone Number	
Medical Expenses			
Dental Expenses		SMALL BUSINESS EXPENSES	
Prescription Expenses		Total Income	
Real Estate Taxes Paid		Advertising Expenses	
Auto Registration Paid		Car and Truck Expense	
Home Mortgage Interest		Commission Paid	
Point Paid		Contract Labor	
Church Contributions		Equipment Purchases	
Misc. Contributions		Insurance	
Goodwill (Bring Receipt)		Legal & Professional Fees	
		Office Expenses	
JOB RELATED EXPENSES		Rent	
Union Dues		Repairs	
Uniforms		Supplies	
Cell Phone Purchase		Taxes and Licenses	
Cell Phone Use		Travel	
Computer Purchase		Meals	
Internet Expense		Utilities	
Tools Purchased		Home Office (square feet)	
Equipment & Supplies Purchased			
Parking and Toll Roads		RENTAL PROPERTY EXPENSE	
Travel for Work		Rents Received	
Meals for Work		Advertising Expense	
Total Miles Driven		Auto & Travel Expense	
Work Related Miles Driven		Cleaning & Maintenance	
Job Search		Commissions	
		Insurance	
Have You Recently Moved?	YES NO	Legal & Professional Fees	
Distance between Old Home and New Home	Miles	Management Fees	
		Mortgage Interest Paid	
Moving Expenses		Other Interest Paid	
Lodging		Repairs	
Miles		Supplies	
Flights / Transportation		Taxes	
		Utilities	
OTHER			
Did you buy a car?		EDUCATION	
Make and Model		Education Expenses (include 1098T form)	
Sales Tax		Name of Institution	
		Address	
		Tuition	
		Books	
		Supplies	
		Parking	
		Lab Fees & Other School Related Expenses	

ALL OF THE ABOVE ITEMS ARE TRUE AND CORRECT (signed) _____

Date: _____