



**MIRA TAX**  
&  
FINANCIAL SOLUTIONS  
**TAX ORGANIZER**

MiraTaxSolutions.com · mira@mirataxsolutions

Taxpayer name: _____	DOB: _____
Social Security#: _____ - _____ - _____	Occupation: _____
Address: _____	
State: _____	Zip: _____
Mobile: _____	E-mail: _____

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		Occupation	
IRA Distribution		Telephone	
Stock Sales (Broker House Year End)		Email	
Pensions			
Real Estate Rental Income		<b>DEPENDENTS</b>	
Unemployment Compensation		First and Last Name	
Social Security Benefits		Date of Birth	
Other Income		Social Security Number	
		Relation (son, daughter, niece, etc)	
<b>DEDUCTIONS</b>		Child Care Expenses	
IRA Contributions		Name & Tax ID # of Child Care Provider	
Student Loan Interest Paid		Address of Provider	
Medical Expenses		Phone Number	
Dental Expenses			
Prescription Expenses		<b>RENTAL PROPERTY EXPENSE</b>	
Real Estate Taxes Paid		Rents Received	
Auto Registration Paid		Advertising Expense	
Home Mortgage Interest		Auto & Travel Expense	
Point Paid		Cleaning & Maintenance	
Church Contributions		Commissions	
Misc. Contributions		Insurance	
Goodwill (Bring Receipt)		Legal & Professional Fees	
		Management Fees	
<b>UNREIMBURSED EMPLOYEE EXPENSES</b>		Mortgage Interest Paid	
Union Dues		Other Interest Paid	
Uniforms		Repairs	
Cell Phone Purchase		Supplies	
Cell Phone Use		Taxes	
Computer Purchase		Utilities	
Internet Expense		HOA Expense	
Tools Purchased			
Equipment & Supplies Purchased		<b>EDUCATION</b>	
Parking and Toll Roads		Education Expenses (include 1098T form)	
Travel for Work		Name of Institution	
Meals for Work		Address	
Total Miles Driven		Tuition	
Work Related Miles Driven		Books	
Job Search		Supplies	
		Parking	
<b>SMALL BUSINESS EXPENSES</b>		Lab Fees & Other School Related Expenses	
Total Income			
Advertising Expenses		<b>OTHER</b>	
Car and Truck Expense		Did you buy a car?	
Commission Paid		Make and Model	
Contract Labor		Sales Tax	
Equipment Purchases			
Insurance		<b>BANK INFO:</b>	
Legal & Professional Fees		Bank Name:	
Office Expenses		Account #:	
Rent		Routing:	
Repairs			
Supplies			
Taxes and Licenses			
Travel			
Meals			
Utilities			
Home Office (square feet)			

ALL OF THE ABOVE ITEMS ARE TRUE AND CORRECT (signed) \_\_\_\_\_ Date: \_\_\_\_\_