



INCOME TAX ORGANIZER

PREMIER INCOME
TAX SERVICES

12900 Azalea Street, Moreno Valley, CA 92555

www.premierincometaxservices.com email: premierincometaxservices@outlook.com

CALL NOW FOR AN APPOINTMENT (714)560-3999 or 951-999-7710

Affordable Tax Services

DATE _____ DAY _____ APPT. TIME _____

Please bring the items that apply to you:

- Photo ID, Driver License or State Issued ID Card
- Social Security Cards and Birth Dates for each Person on your return
- Copies of all W-2 Wage Statements
- Copies of all 1099 Income Reporting Statements
- Form 1099-R Pension Income and/or Distribution or Rollover from Retirement accounts
- Form SSA-1099 Social Security Benefits
- Form 1099-INT (Interest income) or 1099-DIV (Dividend income)
- Form W-2G Gambling Winnings
- Form 1099-B Sale of Stocks or Bonds
- Form 1099-S Sale of Real Property
- Form 1098-E Student Loan Interest
- Form 8949 Cryptocurrency transaction report
- Form 1099-G Government Payments, Unemployment or Family Leave Compensation or State Refund
- Form 1098 Mortgage Interest Statement
- Worksheets of business income and expenses
- Worksheets of rental income and expenses
- Escrow settlement statement for property bought or sold
- Previous two years of tax returns

EDUCATION CREDIT

Bring information of qualified amount of tuition paid. This is reported on Form 1098-T from education institutions. Also bring cost of course materials and supplies associated with form 1098-T.

RESIDENTIAL ENERGY EFFICIENT PROPERTY CREDIT (SOLAR CREDIT HAS BEEN EXTENDED TO 2034)

Bring purchase contract and certification of your residential solar unit.

CHILDCARE CREDIT

Please have the following information readily available:

Provider's Name: _____

Phone No.: _____

Address: _____

Federal ID or SS #: _____

Amount paid last year: \$ _____

MEDICAL EXPENSES

- Insurance Premium \$ _____
- Long Term Care Ins. \$ _____
- Prescription Drugs \$ _____
- Dr. Visits/Co-pays \$ _____
- Dentist Expenses \$ _____
- Hospital Expenses \$ _____
- Glasses/Contacts \$ _____
- Hearing Aids \$ _____
- Travel miles for Dr. visit \$ _____

TAXES

- Payments to the State \$ _____
- Property Taxes \$ _____
- Supplemental R/E \$ _____
- Time Share \$ _____
- Personal Property \$ _____
- Auto License (VLF) \$ _____
- Auto License (VLF) \$ _____
- Other _____

INTEREST

- Mortgage Interest #1 \$ _____
 - Mortgage Interest #2 \$ _____
 - If paid to individual \$ _____
- Name: _____
Address: _____
SS#: _____

CONTRIBUTIONS

- Church \$ _____
- By cash or check \$ _____
- Payroll deductions \$ _____
- Salvation Army \$ _____

RECEIPT NON-CASH CONTRIBUTIONS

- Salvation Army \$ _____
- Goodwill \$ _____
- Cancer Society \$ _____
- Volunteer Expense \$ _____
- Volunteer Miles \$ _____

MISCELLANEOUS

- Union Dues \$ _____
- Tax Preparation Fee \$ _____
- Education Expense \$ _____
- Job Seeking Expense \$ _____
- Professional License \$ _____
- Professional Journals \$ _____
- Safety Equipment \$ _____
- Tools/Supplies \$ _____
- Uniform Expense \$ _____
- Business Mileage \$ _____
- Business Travel \$ _____
- Business Meals \$ _____
- Business Phone \$ _____
- Safe Deposit Box \$ _____
- Investment Expense \$ _____
- IRA Fees \$ _____