Gomez Tax Corp.
*Client Organizer**

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1. Personal Information (returning clients can skip sections 1 through 4)

	Name	Soc. Sec. No.	Birthdate	Cell Phone	Occupation
Taxpayer					
Spouse					
Email					
	Address	City	State	Zip	Other Phone

State-Issued Driver's License

	ID Number	State	Issue Date	Expiration Date
Taxpayer				
Spouse				

2. Children and Other Dependents

	Name	Soc. Sec. No.	Relationship	Birthdate
a.				
b.				

3. Your Marital Status and Source of Income

[____] Single	[____] Married Filing Joint
[____] Head of Household - with dependent(s)	
[____] Married Filing Separate	
[____] Widow(er) with qualifying dependents	

4. Direct Deposit Information (if necessary)

Routing No.	
Account No.	

5. Additional Information

Yes	No					
		Contribute to a traditional or Roth IRA?	(Please privide 1099-R forms)			
		If yes, how much? You $		Spouse $		
		Roll over an existing IRA to a ROTH IRA?				
		Receive any partnership, estate, or trust income?				
		Receive any Social Security? (If Yes, please provide 1099-SSA forms)				
		Have a casualty or theft loss over 10% of your income?				
		Move over 50 miles to a new residence because of a job change?				
		Pay any estimated taxes?	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
		If Yes, please enter amounts				
		Receive any state unemployment? If yes, please provide forms.				
		Pay any student loan interest? Interest Paid $				
		Pay any college tuition? Tuition Paid $				

Client Worksheet (Page 2)

6. Interest/Dividends from checking, savings, or other accounts (please provide 1099's)

Bank Name	Interest	Dividends	Qualified	Cap. Gain Div.

7. Investments You Sold from stocks, bonds, or mutual funds accounts

(Please simply provide your Year-End Gain/Loss Schedule provided by the institution)

8. Child Care Expenses (Day Care, Pre-School if both parents work)

Name of Care Provider	Address	EIN or SSN	Amount

9. Itemized Deductions

a. Out-of-Pocket Medical Expenses (must be greater than 7.5% of your income) ______

b. Real Estate/Property Taxes Paid ______ **(maximum $10,000)**
Personal Property Taxes Paid ______

c. Mortage Interest Paid (Form 1098) ______
Additional Interest ______
Mortgage Insurance Premiums Paid ______

d. Charitible Contributions - Cash ______
- Non-cash ______ (Please provide donation receipt)

e. Gambling Losses ______ **Winnings** ______ **(Please attach W2G)**

f. Investment Interest ______

Client Worksheet (Page 3)

10. Business Worksheet (for self-employed sole-proprietors and freelancers with 1099-MISC income)

1. Income earned from self-employment (Form 1099-MISC) ____

2. Expenses paid (should be backed up with physical receipts)

Advertising		
Automobile:		
Date use began	/ /	
Biz. Mileage		
Total Mileage		
Parking		
Gas		
Insurance		
Oil changes		
Repairs		
Tire changes		
Tolls		
Commissions paid		
Contract Labor (1099s sent to others)		
Depreciation		
Insurance (non-medical)		
Mortgage Interest		
Business credit card interest		
Legal and professional fees		
Office expenses		
Equipment rental		
Rent (non-home)		
Repairs & maintenance		
Supplies or Production costs		
Licenses		
Travel		
Meals & entertainment		
Utilities (non-home)		
Business account bank fees		
Computer & internet expenses		
Publications		
Research		
Telephone		
Transportation		

Business Use of Your Home	
Square footage of work area	
Total square footage of home	
Rent paid	
Utilities paid	

Client Worksheet (Page 4)

11. Rental Property Worksheet

	Property 1	Property 2	Property 3
Address & Zipcode			
Date of purchase	/ /	/ /	/ /
Purchase amount (for depreciation purposes)			
Rental income			
Advertising			
Auto & travel			
Cleaning /maintenance			
Insurance			
Legal & profgessional			
Management fees			
Mortgage interest			
Other interest			
Repairs			
Supplies			
Taxes			
Utilities			

* **<u>NOTE</u>:** This organizer is presented as a guide and is to be used for informational purposes only. This organizer is not intented to calculate or prepare an income tax return, nor does this organizer constitute tax or legal advice. Consult Mark Gomez, or another tax professional when using this organizer.