

AZZARA TAX SERVICE
5709 SOUTH REMINGTON PLACE STE 111
SIOUX FALLS, SD 57108-5157
Telephone: (605) 335-4983
Fax: (605)335-4986

TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last Name..... _____		Last Name.... _____	
First Name..... _____		First Name.... _____	
Middle Initial..... _____	Suffix.... _____	Middle Initial.. _____	Suffix.... _____
Social Security Number..... _____		Social Security Number..... _____	
Occupation..... _____		Occupation.... _____	
Work Phone..... _____	Ext.. _____	Work Phone... _____	
Cell Phone..... _____		Cell Phone.... _____	
E-mail Address.. _____		E-mail Address..... _____	
Date of Birth..... _____		Date of Birth..... _____	
Address..... _____		Apartment #.. _____	
City..... _____	State.... _____	Zip Code... _____	
Home Phone..... _____	Fax Number... _____		
Did everyone listed on the tax return have health insurance for the entire year? _____			

Dependent Information					
First Name Last Name	MI Suffix	Social Security Number Relationship	Date of Birth	Months Lived w/Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses			
Name	Address	ID Number	Amount Paid

Education Tuition and Fees
 Attach all Form 1098-T's and a list of your qualified education expenses.

Student Loan Interest Paid
 Enter total qualified student loan interest..... _____

Attach Form (s) W-2 - Wages, Salaries, Tips and Other Compensation		Amount
Employer Name	_____	_____
Attach Form(s) 1099-R - Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc		Amount
1099-R Payer Name	_____	_____
Attach Form(s) 1099-MISC - Miscellaneous Income		Amount
1099-MISC Payer Name	_____	_____
Attach Form(s) 1099-INT - Interest Income		Amount
1099-INT Payer Name	_____	_____
Attach Form(s) 1099-DIV - Dividend Income		Amount
1099-DIV Payer Name	_____	_____
Attach Form(s) 1099-B, 1099-S - Sales of Stocks, Bonds, Real Estate, etc		
Attach all stock sale transaction information, including original purchase price information.		
Other Government Forms to attach:		
Form(s) 1099-G - Certain Government Payments, Schedule K-1's - Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G - Gambling or Lottery Winnings, Form(s) 1099-Q - Payments from Qualified Education Programs		
Other Income:		
Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.		
Retirement Plan Contributions	Taxpayer	Spouse
Traditional IRA contributions	_____	_____
Roth IRA contributions	_____	_____
SEP, Keogh, Individual 401k or SIMPLE Contributions	_____	_____
Taxes		Amount
Real estate taxes paid on principal residence	_____	_____
Real estate taxes paid on additional homes or land	_____	_____
Other personal property taxes	_____	_____
Interest Expenses		
Home mortgage interest paid - Attach Form(s) 1098		Amount
Lender's Name		Amount
Points paid on loan to buy, build or improve main home		
Lender's Name		Amount

Cash/Check/Credit Contributions	Amount

Miscellaneous Deductions	Amount
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Union and professional dues	
Professional subscriptions, books, supplies	
Uniforms and protective clothing (including cleaning)	
Job search costs	
Taxpayer educator expenses	
Spouse educator expenses	
Tax return preparation fees	
Safe deposit box rental	
Gambling losses (to the extent of gambling income)	
Other expenses (list): _____	

	Yes	No
1. Have you deferred a Roth IRA Conversation in the past 3 years?	_____	_____
2. Did a lender cancel any of your debt i ?	_____	_____
3. Did you purchase a motor vehicle or boat ?	_____	_____
4. Did you change your marital status?	_____	_____
If yes, explain: _____		
5. Do you have dependents who must file?	_____	_____
6. Do you have children who are under 19 or a full time student under age 24 with investment income greater than \$1900?	_____	_____
7. Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan with 60 days of the distribution?	_____	_____
8. a. Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property? If yes , attach closing or escrow statements, 1099-C or 1099-A forms.	_____	_____
b. If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it? Are you paying installments for 2008 \$7500 tax credit ?	_____	_____
9. Did you incur any moving expenses? If yes , attach details	_____	_____
10. Did you or your spouse elect continuation of COBRA coverage after your employment was involuntary terminated?	_____	_____
11. Did you receive any income not included in this Tax Organizer? If yes , please attach information.	_____	_____
12. If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
13. Enter your state of residence _____		

Estimated Tax Payments

Date	_____	_____	_____	
Amount	_____	_____	_____	

Additional Information (enter any additional information here and attach any documents)
