



Call for an appointment today: (801) 731-7361

Tax Organizer

This worksheet is provided for your convenience to help in gathering the information needed to prepare your tax return.

If you are going to mail this in please include your W2's, 1099's & K1's. Please keep one copy for yourself.

If you are going to fax the information, please fax a copy of your W2's, 1099's and K1's.

If you are going to E-mail, please scan all W2, 1099's, K1's and any other info to complete your taxes.

NOTE: If you are a returning client there is no need to fill in Dependents info. We will already have this info on file. If you had a new child or something changed, then please provide the new info.

Your Name		Date of Birth	Spouse's Name		Date of Birth		
Your SSN	Occupation		Spouse's SSN	Occupation			
Street Address		Daytime Phone #	Evening Phone #	Cell Phone #			
City		State	Zip				
E-Mail Address							
Check One <input type="checkbox"/> Single <input type="checkbox"/> Married Filing Jointly <input type="checkbox"/> Married Filing Separate (if you check this enter spouse's info above) <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Widow/Widower							
Refund Handling If you'd like your refund (if any) direct deposited		Name of Bank <input type="checkbox"/> Checking <input type="checkbox"/> Savings		Bank Routing Number	Account Number		
Did your marital status change during 2014?		Y	N	Remarks:			
Are you being claimed as a dependent by another taxpayer?		Y	N				
Were there any changes in dependents from the prior year?		Y	N				
Were there any changes in any prior years to income, deductions credits etc, which would require filing an amended return?		Y	N				
Dependents: (other than you and your spouse) Name (First, MI,)(Last <i>if different</i>)		Social Security Number		Relationship	Months in home	Date of Birth	
Interest Income from form 1099INT		Box 1	Box 2	Box 3	Box 4		
Name of Payer		Interest Earned	Penalty	Savings Bonds	Federal Tax Withheld		
Dividend Income from form 1099DIV		Box 1a	Box 1b	Box 2a	Box 4	Box 6	Box 7
Name of Payer		Ordinary	Qualified	Cap Gains	F/W	Foreign Tax	Foreign Cntry

Miscellaneous Income

Mail to: Diversified Tax 1920 W 250 N Suite 11 MSC, UT 84404
 E-Mail to: info@diversifiedtax.com Web Address: www.diversifiedtax.com
 Fax to: (801)-731-7950



Call for an appointment today: (801) 731-7361

Social Security Benefits You Received (form 1099 SSA)		Box 5 Social Security Received		Box 3 Medicare Premium		Box 6 Fed Tax W/H	
Taxpayer							
Spouse							
Unemployment Compensation You Received							
Unemployment Received		Federal W/H		State W/H		Name of State	
Taxpayer							
Spouse							
Alimony Received		Taxpayer			Spouse		
State Refund Received in 2014		Taxpayer			Spouse		
Estimated Taxes Paid	1 st Qtr (Apr 2014)	2 nd Qtr (Jun 2014)	3 rd Qtr (Sep 2014)	4 th Qtr (Jan 2015)	State (Total for the year)		

Adjustments to Income		Roth		Traditional		Roth		Traditional	
Contributions to IRA's		Taxpayer				Spouse			
Student Loan Interest		Taxpayer				Spouse			
Alimony Paid		SSN of Person paid to				Amount			

Personal Itemized Deductions							
Medical		Amount		Charitable Contributions		Amount	
Prescription Drugs				Cash Contributions			
Medical Ins Premiums							
Long Term Care Ins Premiums							
Doctors/Dentists/Hospitals							
Miscellaneous Medical Expenses							
Medical Miles				Other Than Cash			
Taxes Paid		Amount		Charitable Miles			
State Tax paid in 2013				Miscellaneous Deductions		Amount	
Real Estate Taxes				Unreimbursed Employee Expenses			
Personal Property				Union & Professional Dues			
Other Taxes				Safe Deposit Box			
Mortgage Interest Paid				Tax Preparation Fee			
Name of Bank Paid		Interest Paid		Points			
Mortgage Ins Premiums Paid				Mileage for work (Business use of your personal vehicle)			
Form 1098T Education Credit				Box 5 Scholarships or Grant		Books & Supplies (not on form 1098)	
Person Tuition was paid for (You, Spouse, Dependant)		Box 1 Payments Received					
Day Care Provider		SSN or Fed ID#		Address		Amount	

Mail to: Diversified Tax 1920 W 250 N Suite 11 MSC, UT 84404
 E-Mail to: info@diversifiedtax.com Web Address: www.diversifiedtax.com
 Fax to: (801)-731-7950