

PETTIGREW & PETTIGREW

CERTIFIED PUBLIC ACCOUNTANTS

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INDIVIDUAL TAX RETURN ORGANIZER

TAX YEAR 2010

GENERAL INFORMATION:

Name: _____ DOB: _____ SSN: _____ Occupation: _____

Work Phone: _____ Cell Phone: _____ Email: _____

Spouse: _____ DOB: _____ SSN: _____ Occupation: _____

Work Phone: _____ Cell Phone: _____ Email: _____

Home Address: _____ Home Phone: _____

DEPENDENTS: (ALL dependents **must have a social security number!)**

	Name	DOB	SSN	Relationship	Months lived in Home in 2010	Income	College Tuition
1.	_____	_____	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____	_____	_____

CHILD CARE PROVIDERS: (For children under age 13; includes preschool tuition)

	Provider Name	Address	SSN or EIN	Amount Paid
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____

INCOME: (Includes Wages, Salaries, Pensions, Annuities, Interest, Dividends, etc.)

****Please bring all W-2 and 1099 forms as well as supporting documents for any other income received****

Social Security	_____	Unemployment Compensation	_____
IRA Withdrawals	_____	Prizes/Awards/Lottery	_____
Alimony Received	_____	Partnership/Estates/Trusts	_____
State Tax Refund	_____	Other	_____
Mortgage Interest Received	_____	Name, Address, SSN of Payer	_____

ADJUSTMENTS TO INCOME:

Traditional IRA Contributions	Self: _____	Spouse: _____
Roth IRA Contributions	Self: _____	Spouse: _____
Traditional IRA Conversion to ROTH IRA	Self: _____	Spouse: _____
Student Loan Interest Paid	Self: _____	Spouse: _____
Alimony Paid _____	Recipient's SSN _____	

Would you like to make an IRA contribution for 2010? _____

(OVER)

DEDUCTIONS:

Medical Expenses

Health Insurance _____	Doctor Bills _____	Dentist _____
Eye Care _____	Miles Driven _____	Prescriptions _____
Long-term Care Ins. _____	Lodging _____	Other Medical _____

Taxes Paid

Property Taxes _____ Car/truck Tags _____

Did you purchase a new car or truck in 2010? _____ Sales tax paid on major purchase? _____

Interest Paid

Home Mortgage (from financial institution) _____ Discount Points _____
 Student Loans _____
 Mortgage Interest Paid to Individual _____ Name & SSN of Person Paid _____
 Did you purchase a new home or refinance your existing home in 2010? _____

Contributions (You must have receipts for all donations)

Church _____ Other _____ Volunteer Mileage _____

	Non-cash Items	Date Purchased	Original Purchase Price	Current Fair Market Value
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

Miscellaneous

Tax Preparation _____	Safe Deposit Box Rental _____	Uniforms _____
Union Dues _____	Professional Dues _____	Education _____
Safety Equipment _____	Professional Publications _____	Other _____

ESTIMATED PAYMENTS:

	<u>Federal</u>	<u>State</u>	<u>Date Paid</u>
Amount applied from prior return	_____	_____	
Current year payments	1. _____	_____	_____
	2. _____	_____	_____
	3. _____	_____	_____
	4. _____	_____	_____

** Did you buy or sell any property, including stocks and bonds in 2010? If so, please provide the following:

	Type of Property	Date Purchased	Purchase Price	Date Sold	Sale Price
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____
5.	_____	_____	_____	_____	_____

** Did you own any rental property or operate a business or farm in 2010? If yes, please call for a rental, business or farm organizer or download the form from our website: www.pettigrewaccounting.com.