Desert Edge Tax & Accounting
Mini Organizer

(Please call if you would like a full organizer)

Bring in all backup documentation

Income:

W-2 income:	
Interest Income:	
Dividend Income:	
Pension/Retirement Income:	
Social Security Income:	
Sale of Assets (Capital Gain or Loss):	
Business Income:(Ask for Worksheet)	
Rental Income: (Ask for Worksheet)	
Unemployment Income	
Federal Stimulus Payments	
Adjustments to Income	
Teachers expense:	
Tuition or Fees:	
Traditional IRA:	
Student Loan Interest:	
Moving Expense:(Military Only)	

Itemized Deductions:

Medical and Dental Expenses:	
Prescription medicines and drugs	
Doctor, dentists, medical professions	
Hospitals and nursing homes	
Insurance premiums	
Long term care premiums	
Insurance reimbursement	
Lodging and transportation:	
Out of pocket expenses	
Medical Miles driven	
Other medical and dental expenses	
Taxes Paid:	
State Taxes not taken from paycheck	
Tags on all vehicle, trailers, boat, etc	
Real Estate Taxes on residences	
Real Estate Tax on investment Property	
Interest Paid:	
Home mortgage interest	
Points not reported on 1098	
Mortgage Insurance premium	
Interest on Investment Property	
Cash Contributions (Cash, check, or credit) Must have receipts.	
Non-profit organizations	
Volunteer expenses(out of pocket)	
Volunteer mileage	
Non Cash Contributions (stuff)	
If total fair market value under $500	
Need receipts if total fair market value over $500	
Miscellaneous Deductions:	
Union dues	
Investment expenses:	
Tax Preparation Fees:	
Safe deposit box rental:	
Gambling expenses up to gambling earnings:	