## **Desert Edge Tax & Accounting** Mini Organizer

(Please call if you would like a full organizer)

## Bring in all backup documentation

## Itemized Deductions

ncome:	Itemized Deductions:	
W-2 income:	Medical and Dental Expenses:	
	Prescription medicines and drugs	
	Doctor, dentists, medical professions	
Interest Income:	Hospitals and nursing homes	
	Insurance premiums	
	Long term care premiums	
Dividend Income:	Insurance reimbursement	
	Lodging and transportation:	
	Out of pocket expenses	
Pension/Retirement Income:	Medical Miles driven	
	Other medical and dental expenses	
Social Security Income:	Taxes Paid:	
	State Taxes not taken from paycheck	
	Tags on all vehicle, trailers, boat, etc	
Sale of Assets (Capital Gain or Loss):	Real Estate Taxes on residences	
	Real Estate Tax on investment Property	
Business Income:(Ask for Worksheet)	Interest Paid:	
	Home mortgage interest	
	Points not reported on 1098	
Rental Income: (Ask for Worksheet)	Mortgage Insurance premium	
	Interest on Investment Property	
	interest on investment roperty	
	Cash Contributions (Cash, check, or	
	credit) Must have receipts.	
Unemployment Income	Non-profit organizations	
	Volunteer expenses(out of pocket)	
	Volunteer mileage	
Federal Stimulus Payments		
·	Non Cash Contributions (stuff)	
	If total fair market value under \$500	
	Need receipts if total fair market value	
	over \$500	
Adjustments to Income	Miscellaneous Deductions:	
Teachers expense:	Union dues	
Tuition or Fees:	Investment expenses:	
Traditional IRA:	Tax Preparation Fees:	
Student Loan Interest:	Safe deposit box rental:	
Moving Expense:(Military Only)	Gambling expenses up to gambling	
	earnings:	