



Client Name: \_\_\_\_\_

Client Phone: \_\_\_\_\_

## Totals Only

### Insurance Premiums

- \_\_\_\_\_ Health, Supplemental Medicare
- \_\_\_\_\_ Taxpayer Long-term Care Premiums
- \_\_\_\_\_ Spouse Long-term Care Premiums

### Medical Travel

- \_\_\_\_\_ Number of miles
- \_\_\_\_\_ Lodging

### Medications & Drugs

- \_\_\_\_\_ Prescriptions

### Doctors, Dentists, Other

- \_\_\_\_\_ Doctor/Dentist, Psychiatrist, Chiropractor, Acupuncture, Optometrist, etc.
- \_\_\_\_\_ Hospitals & Nursing Homes

### Other Medical & Dental Expenses

- \_\_\_\_\_ Eye Glasses, Contact Lenses
- \_\_\_\_\_ Hearing Aids & Batteries
- \_\_\_\_\_ Lab Fees
- \_\_\_\_\_ X-rays
- \_\_\_\_\_ Hospital Supplies
- \_\_\_\_\_ Crutches, Wheel Chairs, Canes, Braces Orthopedic Shoes, etc.
- \_\_\_\_\_ Humidifiers for Severe Allergies
- \_\_\_\_\_ Prescribed Exercise or Weight Loss Program
- \_\_\_\_\_ Physical Therapy

### Drivers Licenses or State Issued ID's

- \_\_\_\_\_ Taxpayer's Driver's License  
OR
- \_\_\_\_\_ Taxpayer's State Issued ID
- \_\_\_\_\_ Spouse's Driver's License  
OR
- \_\_\_\_\_ Spouse's State Issued ID

## Original Documents

### Taxes Paid

- State & Local Income Taxes
- Real Estate Taxes
- Vehicle License Tax (VLT) fees

### Major Purchases

Did you purchase a new vehicle? RV? Boat?  
Please bring in your purchase contract

### Mortgage Interest Paid

- Home mortgage (bring form 1098)
- Home mortgage NOT on 1098
  - Name of person
  - Address
  - SS#
  - Amount paid

### Gifts to Charity

#### You must have a receipt!!!!

- Gifts by cash or check (bring receipt and/or canceled check)
- Non-cash donations\* (bring receipt and list of items)
- Miles driven for charity (bring mileage log)
- AZ Tax Credit receipts

### Additional Organizers

Visit our website at [www.gmtaxes.net](http://www.gmtaxes.net) and click on the Resources tab.

- Business use of home
- Self-employed income/expenses (Schedule C)
- Rental Home (Schedule E)
- Business/Rental vehicle use
- Non-cash contributions
- Education Credits

\* All our organizers are available on our website at [www.gmtaxes.net](http://www.gmtaxes.net)



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## PLEASE BRING ORIGINAL DOCUMENTS

- Wages (W-2)
- Interest Income (1099-INT)
- Tax Exempt Interest (bring statements)
- Dividend Income (1099-DIV)

- Pensions/Annuities (1099-R)
- IRA Withdrawals (1099-R)
- Social Security (1099 SSA)
- Unemployment Compensation (1099-G)

- State Income Tax Refunds (1099-G)
- Gambling/Lottery (W-2 G)
- Royalties (1099-Misc)

- K-1 for Partnerships, S-Corp
- K-1 for Estates & Trusts

- IRAs (bring year end statements)
- IRA deduction amount paid
- 401(k)s (bring year end statements)
- 403(b) (bring year end statements)
- Keogh and self-employed SEP & Simple
- Health savings account (bring statement)

- Property or Land Sold – bring original purchase statement and selling statement
- Foreclosure/Debt Cancellation – bring forms 1099-A & 1099-C

### Rental Income & Expense\*

Call for an organizer or visit our website at [www.gmtaxes.net](http://www.gmtaxes.net) and click on the Resources tab.

### Childcare

- Name, Address, SS# or EIN# of each provider
- Amount paid to each provider
- Amount paid for each child

### Credits (bring original documents)

- Solar Systems Credit
- Energy Efficient Home Improvements
- Tuition Credit
- Donations to Arizona Schools
- Donations to Working Poor
- Arizona School Tuition Tax Donation
- Adoption credit

### Business Income\*

- Business Income & Expenses
  - Auto Expenses
  - Mileage Log
- Call for an organizer or visit our website at [www.gmtaxes.net](http://www.gmtaxes.net) and click on the Resources tab.

### Investments & Stocks

- Purchase statements/cost basis
- Year-end statement (all pages)
- 1099-B
- Investment Expenses \_\_\_\_\_

- Alimony received and SSN of payer
- Alimony paid and SSN of recipient
- Year was divorce finalized \_\_\_\_\_

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**[john@gmtaxes.net](mailto:john@gmtaxes.net)**

\* All our organizers are available on our website at [www.gmtaxes.net](http://www.gmtaxes.net)