AZZARA TAX SERVICE
5709 SOUTH REMINGTON PLACE STE 111
SIOUX FALLS, SD 57108-5157
Telephone: (605) 335-4983
Fax: (605)335-4986

TAX ORGANIZER

Taxpayer Information			**Spouse Information**		
Last Name…….			Last Name….		
First Name…….			First Name….		
Middle Initial……	Suffix….		Middle Initial..	Suffix….	
Social Security Number…..			Social Security Number….....		
Occupation…….			Occupation….		
Work Phone…..	Ext..________		Work Phone...		
Cell Phone…….			Cell Phone….		
E-mail Address..			E-mail Address…………….		
Date of Birth……………………………			Date of Birth..……………….		
Address………..				Apartment #..	
City…………….			State….	Zip Code…	
Home Phone…..			Fax Number…		

Did everyone listed on the tax return have health insurance for the entire year? ____________ YES

Dependent Information

First Name / Last Name	MI / Suffix	Social Security Number / Relationship	Date of Birth	Months Lived w/Taxpayer	Child Care Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Attach all Form 1098-T's and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total qualified student loan interest……………………………………………	

Attach Form (s) W-2 - Wages, Salaries, Tips and Other Compensation

Employer Name	Amount

Attach Form(s) 1099-R - Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name	Amount

Attach Form(s) 1099-MISC and 1099-NEC- Miscellaneous Income/Non employee comp

	Amount

Attach Form(s) 1099-INT - Interest Income

	Amount

Attach Form(s) 1099-DIV - Dividend Income

	Amount
	0

Attach Form(s) 1099-B, 1099-S - Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including original purchase price information.	0

Other Government Forms to attach:

Form(s) 1099-G - Certain Government Payments, Schedule K-1's - Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G - Gambling or Lottery Winnings, Form(s) 1099-Q - Payments from Qualified Education Programs, 1099-DA from digital assets

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions	**Taxpayer**	**Spouse**
Traditional IRA contributions		
Roth IRA contributions		
SEP, keogh, individual 401K or SIMPLE contributions		

Taxes	**Amount**
Real estate taxes paid on primary home	
Real estate taxes paid on additional homes or land	
Other personal property taxes	

Interest Expenses	
Home mortgage interest paid-Attach Form(s) 1098	

Lender's Name		**Amount**
Points paid on loan to buy, build or improve main home		
Lender's Name		**Amount**
Cash/Check/Credit Contributions		**Amount**
Miscellaneous Deductions		**Amount**
Union and professional due (non South Dakota residents)		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Gambling losses (to the extent of gambling income)		
Other expenses (list):		
	Yes	**No**
1. Have you deffered a Roth IRA Conversation in the past 3 years?		
2. Did a lender cancel any of your debt ?		
3. Did you purchase a motor vehicle or boat ?		
4. Did you change your marital status?		
If yes, explain:		
5. Do you have dependents who must file?		
6. Do you have children who are under 19 or a full time student under age 24 with investment income greater than $1900?		
7. Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan with 60 days of the distribution?		
8. a. Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property? If **yes**, attach closing or escrow statements, 1099-C or 1099-A forms.		
b. If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it? Are you paying installments for 2008 $7500 tax credit ?		
9. Did you incur any moving expenses? If **yes**, attach details		
10. Did you or your spouse elect continuation of COBRA coverage after your employment was involuntary terminated?		
11. Did you receive any income not included in this Tax Organizer? If **yes**, please attach information.		
12. If you paid any alimony, enter recipient's SSN: Alimony paid:		
13. Enter your state of residence		
Estimated Tax Payments (What you paid to the IRS for the tax year being filed)		
Date		
Amount		

Additional Information (enter any additional information here and attach any documents)								

