**PETTIGREW & PETTIGREW**

CERTIFIED PUBLIC ACCOUNTANTS

150 Roberson Mill Road

Milledgeville, GA 31061

(478) 453-9305

*www.pettigrewaccounting.com*

**INDIVIDUAL TAX RETURN ORGANIZER**

**TAX YEAR 2017**

GENERAL INFORMATION:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DOB: \_\_\_\_\_\_\_\_\_\_\_\_SSN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_Occupation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Work Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Cell Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DOB:\_\_\_\_\_\_\_\_\_\_\_\_SSN:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Occupation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Work Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Cell Phone:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**NEW: WAS YOUR ENTIRE HOUSEHOLD COVERED BY HEALTH INSURANCE FOR ALL 12 MONTHS?\_\_\_\_\_\_\_\_**

**PROVIDER\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_For plans purchased through the Federal Exchange, provide form 1095-C**

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

Months lived in College

Name DOB SSN Relationship Home in 2017 Income Tuition

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_

4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_

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

Amount

Provider Name Address SSN or EIN 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:

HSA Contributions Self:\_\_\_\_\_\_\_\_\_\_\_\_ Family:\_\_\_\_\_\_\_\_\_\_\_\_\_

Traditional IRA Contributions Self: \_\_\_\_\_\_\_\_\_\_\_\_ Spouse: \_\_\_\_\_\_\_\_\_\_\_\_

Roth IRA Contributions Self: \_\_\_\_\_\_\_\_\_\_\_\_ Spouse: \_\_\_\_\_\_\_\_\_\_\_\_

Student Loan Interest Paid Self: \_\_\_\_\_\_\_\_\_\_\_\_ Spouse: \_\_\_\_\_\_\_\_\_\_\_\_

Alimony Paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Recipient’s SSN \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Would you like to make an IRA contribution for 2017? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(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\_\_\_\_\_\_\_\_\_\_\_\_ Title Ad Valorem (TAV) Tax\_\_\_\_\_\_\_\_\_

**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 2017? \_\_\_\_\_\_\_\_\_\_

**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 \_\_\_\_\_\_\_\_\_\_\_\_ Uniform \_\_\_\_\_\_\_\_\_\_\_\_

Union Dues \_\_\_\_\_\_\_\_\_\_\_\_ Professional Dues \_\_\_\_\_\_\_\_\_\_\_\_ Education \_\_\_\_\_\_\_\_\_\_\_\_

Safety Equipment \_\_\_\_\_\_\_\_\_\_\_\_ Professional Publications \_\_\_\_\_\_\_\_\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_

ESTIMATED PAYMENTS:

Federal Date Paid Check Number State Date Paid Check Number

1. \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*\* Did you buy or sell any property, including stocks and bonds in 2017? 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 2017? If yes, please call for a rental, business or

farm organizer or download the form from our website: www.pettigrewaccounting.com.

*IF YOU WOULD PREFER A MORE DETAILED AND SPECIFIC ORGANIZER (SOFTWARE GENERATED) EMAILED TO YOU PLEASE LET US KNOW BY EMAILING US AT custserv@pettigrewaccounting.com*