

PERSONAL INCOME TAX ORGANIZER		
ALL SEASON TAX CENTER		
209 E BASELINE RD, SUITE E-105 (SE CORNER OF BASELINE & MILL)		
TEMPE, AZ 85283		
Telephone: (480) 968-7202		
Fax: (480) 452-0891		
website: www.allseasontax.com		
email: kathy@allseasontax.com		
<i>Bring the following documents and information with you for your tax appointment:</i>		
1. Copy of your previous year's tax return (if you are a new client)		
2. Original copies of all W2s , 1099s (self employment, interest, dividends), 1098s (mortgage interest)		
3. Copies of K-1s for partnerships, S Corporations, estates, or trusts		
4. Information regarding cost basis for any assets sold (real estate, investments)		
5. HUD-1s (Settlement Statements) for the purchase, sale or refinance of real estate		
6. Dependent Information: Name, Date of Birth, Social Security Number & no of months lived with you		
7. Dependent Care Expenses: Name, Address, Tax ID Number of Provider & Amount Paid		
	Taxpayer	Spouse
Name		
Address		
Social Security No		
Date of Birth		
Occupation		
Home Telephone		
Cellular		
Work Phone		
Email Address		
Were you a resident of Arizona for the full year?		
If not: Other States _____ Dates of Residency _____		
Did you pay for your own moving expenses?		

DEPENDENT DEDUCTIONS:				
	NAME	DATE OF BIRTH	SSN	RELATIONSHIP
DEPENDENT				
DEPENDENT				
DEPENDENT				
DEPENDENT				
DEPENDENT				
DEPENDENT				
ESTIMATED TAX PAYMENTS:				
	FEDERAL	ARIZONA	OTHER_____	DATE PAID
APPLIED REFUND				N/A
1ST QUARTER				
2ND QUARTER				
3RD QUARTER				
4TH QUARTER				
CREDITS:				
CHILD CARE CREDIT (IF MARRIED, MUST FILE JOINTLY AND BOTH SPOUSES MUST HAVE INCOME):				
PROVIDERS NAME & ADDRESS:				
SOCIAL SECURITY OR TAX ID NUMBER:				
AMOUNT PAID:				
EDUCATIONAL CREDITS & STUDENT LOANS INTEREST:				
TUITION PAID FOR FRESMAN/SOPHMORE IF IN SCHOOL HALF TIME OR MORE:				
OTHER TUITION:				
OTHER EDUCATIONAL EXPENSES (BOOKS, SUPPLIES)				
STUDENT LOAN INTEREST PAID:				
ARIZONA CREDITS: BRING RECEIPTS				
SCHOOL TAX CREDIT (PUBLIC SCHOOLS)				
SCHOOL TUITION CREDIT (PRIVATE SCHOOLS)				
SOLAR ENERGY CREDIT				