



MG Peterson Consulting PLC
www.cpaarizona.com

TAX RETURN ORGANIZER					
Tax Payer's Name:			SSN:		
Spouse's Name			SSN:		
Tax Payer's Occupation:			Date of Birth:		
Spouse's Occupation:			Date of Birth:		
Address:					
City:		State:	Zip:	Home Phone:	
Taxpayer's Work #:			Taxpayer's cell #:		
Spouse's Work #:			Spouse's cell #:		
Email:					

DEPENDENT CHILDREN				
Name (First, MI, Last)	Date of Birth	SSN	Relationship	Months in Home

INCOME					
Payer of Interest Income	Amount	H-W-J	Payer of Dividend Income	Amount	H-W-J

* H-Husband W-Wife J-Jointly Owned

MEDICAL EXPENSES	
Health Insurance & Medicare Premiums	
Prescription Medicines	
Doctors & Hospitals	
Dentists	
Medical Miles	
Other	

CONTRIBUTIONS	
Cash/Checks	
Goods	

GAMBLING	
Winnings	
Losses	

INTEREST EXPENSES	Main Home	2nd Home
Home Mortgage- paid to financial institute		
Home Mortgage- paid to individual		
Mortgage Points		
Investment Interest		

CHILD CARE EXPENSES	
# of dependents cared for <input style="width: 50px;" type="text"/>	Expenses <input style="width: 50px;" type="text"/>

*required by law to provide the names, addresses, ID #, & amounts paid to each child care provider

TAXES	
Property Taxes (Residence)	<input style="width: 100%;" type="text"/>
Property Taxes (Other)	<input style="width: 100%;" type="text"/>
Auto License Fees (Tags)	<input style="width: 100%;" type="text"/>
AZ Taxes paid on last yrs rtn	<input style="width: 100%;" type="text"/>

EMPLOYEE BUSINESS EXPENSES	
Total Bus Miles Driven	<input style="width: 100%;" type="text"/>
Other Expenses	<input style="width: 100%;" type="text"/>
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>

	Husband	Wife
Alimony Paid or Received	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Social Security Income	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

MISCELLANEOUS			
Employee Education	<input style="width: 100%;" type="text"/>	Subscription/Publications	<input style="width: 100%;" type="text"/>
Job Seeking	<input style="width: 100%;" type="text"/>	Tax Return Prep Fee	<input style="width: 100%;" type="text"/>
Safe Deposit Box	<input style="width: 100%;" type="text"/>	Uniforms	<input style="width: 100%;" type="text"/>
Safety & Protective Equipment	<input style="width: 100%;" type="text"/>	Union & Professional Dues	<input style="width: 100%;" type="text"/>

SELF EMPLOYED BUSINESS	
Gross Income	<input style="width: 100%;" type="text"/>
<u>Expenses</u>	<input style="width: 100%;" type="text"/>
Advertising	<input style="width: 100%;" type="text"/>
Meals & Entertainment	<input style="width: 100%;" type="text"/>
Office Expenses	<input style="width: 100%;" type="text"/>
Insurance	<input style="width: 100%;" type="text"/>
Interest Paid	<input style="width: 100%;" type="text"/>
Rent: Equipment	<input style="width: 100%;" type="text"/>
Rent: Office	<input style="width: 100%;" type="text"/>
Legal & Professional	<input style="width: 100%;" type="text"/>
Repairs	<input style="width: 100%;" type="text"/>
Supplies	<input style="width: 100%;" type="text"/>
Taxes	<input style="width: 100%;" type="text"/>
Telephone	<input style="width: 100%;" type="text"/>
Travel	<input style="width: 100%;" type="text"/>
Wages	<input style="width: 100%;" type="text"/>
Contact Labor	<input style="width: 100%;" type="text"/>
Other	<input style="width: 100%;" type="text"/>
Other	<input style="width: 100%;" type="text"/>
Business Mileage	<input style="width: 100%;" type="text"/>

RENTAL			
Gross Income	<input style="width: 100%;" type="text"/>		
<u>Expenses</u>	<input style="width: 100%;" type="text"/>		
Advertising	<input style="width: 100%;" type="text"/>		
Cleaning & Maintenance	<input style="width: 100%;" type="text"/>		
Insurance	<input style="width: 100%;" type="text"/>		
Interest: Mortgage	<input style="width: 100%;" type="text"/>		
Interest: Other	<input style="width: 100%;" type="text"/>		
Legal & Professional	<input style="width: 100%;" type="text"/>		
Management Fees	<input style="width: 100%;" type="text"/>		
Repairs	<input style="width: 100%;" type="text"/>		
Supplies	<input style="width: 100%;" type="text"/>		
Taxes	<input style="width: 100%;" type="text"/>		
Utilities	<input style="width: 100%;" type="text"/>		
Other	<input style="width: 100%;" type="text"/>		
Business Mileage	<input style="width: 100%;" type="text"/>		
If you purchased a rental:			
Description	Date	Amount	Address
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Equipment Purchases:		
Description	Amount	Date
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

OTHER INFO	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>
<input style="width: 90%;" type="text"/>	<input style="width: 100%;" type="text"/>