



**2017 Tax Organizer
For Individuals
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Durst Jordan, CPA, P.A.
2017 Tax Organizer

Sources of Income (Please provide supporting forms)	Check if Applicable (✓)
Please provide a copy of your driver's license or other IRS approved identification. This applies to both the taxpayer and spouse.	
Forms W-2	
Forms 1099	
Retirement Plan Distributions	
Social Security or Other Benefits	
K-1 Income from Partnerships, Corporations or LLC's	
Form 1095-A or Marketplace Exemption Form	
Other (Please Describe)	
Deductions (Please provide supporting forms, if applicable)	
Child and Dependent Care Provider Expenses (You must have their Federal Identification Number)	
Education Tuition and Fees/Books, Supplies, Etc. (For college students please notate how many years completed and supply their Form 1098-T)	
Student Loan Interest Paid	
Medical and Dental Expenses	
Real Estate Taxes	
Home Mortgage Interest Paid	
Charitable Contributions	
Union/ Professional Dues	
Professional Books/ Supplies	
Uniforms	
Other (Please Describe)	

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Specific Tax Areas	Answer Yes or No
Due to the Affordable Care Act, you are required to report proof of health insurance coverage or exemption for each individual listed on the return. Please provide your Form 1095-A or Marketplace Exemption. We will not be able to file your return without this form.	
Do you own rental properties? If so, please contact our office for a rental organizer.	
Do you own a farm?	
Did your marital status or dependents change in 2017?	
Did you buy/sell/finance a principal residence or other properties?	
Did you incur any casualty or theft losses?	
Did you buy/sell any stocks or bonds? If yes, please provide dates and amounts:	
Did you incur any moving expenses?	
Did you purchase a new vehicle in 2017 and pay the sales tax in 2017?	
Are you an educator?	
Are you a member of a partnership, LLC, or other corporation?	
Did you in 2017 make a qualified rollover contribution to a Roth IRA?	
Did you in 2017 make any qualified charitable contributions directly from an IRA?	
Did you make residential energy improvements? Such as solar water heaters or solar panels.	
Did you make any estimated tax payments? If so, how much and when?	
Did you receive any income or incur any expense not included in this organizer? If yes, please describe:	

Please contact our office if you would like a full comparative organizer emailed to you.

Please feel free to drop off your tax forms, documents and completed organizer during office hours. You do not need an appointment to drop off documents listed within this organizer.