

# TAX ORGANIZER

If mailing, please only mail  
copies of your tax documents.

## RENTAL EXPENSES:

Number of days Rented \_\_\_\_\_

Number of days Personal Use \_\_\_\_\_

RENT INCOME \_\_\_\_\_

ADVERTISING \_\_\_\_\_

AUTOMOBILE EXPENSES \_\_\_\_\_

CLEANING AND MAINTENANCE \_\_\_\_\_

INSURANCE \_\_\_\_\_

LEGAL FEES \_\_\_\_\_

ACCOUNTING FEES \_\_\_\_\_

MANAGEMENT FEES \_\_\_\_\_

MORTGAGE INTEREST \_\_\_\_\_

REPAIRS \_\_\_\_\_

SUPPLIES \_\_\_\_\_

TAXES \_\_\_\_\_

UTILITIES \_\_\_\_\_

REFINANCE POINTS \_\_\_\_\_

HOA DUES \_\_\_\_\_

CONTRACT LABOR \_\_\_\_\_

PHONE EXPENSE \_\_\_\_\_

HOME IMPROVEMENTS (ITEMIZE)

DATE: \_\_\_\_\_ ITEM: \_\_\_\_\_ AMOUNT: \_\_\_\_\_

**SAVE TIME!!!**

**For Your Convenience**

**Mail In & Secure Virtual Portal**

EMAIL  
ADDRESS: \_\_\_\_\_

VERIFY for payments and deposits:

BANK:

ROUTING NUMBER:

ACCOUNT NUMBER:

COLLEGEINVEST ACCOUNT CONTRIBUTIONS

COLLEGE TUITION:

INCLUDE AMOUNTS PAID FOR:

TUITION \_\_\_\_\_

Books & required course

Materials \_\_\_\_\_

**SORT BY PERSON RECEIVING  
EDUCATION!**

## TAX TIME

Secure Portal is the quickest way:  
[taxqueen.sharefile.com](https://taxqueen.sharefile.com)



**Heather Ryan EA**

13918 E Mississippi Ave #62982  
Aurora CO 80012

<https://tax-queen.com>  
[heather@tax-queen.com](mailto:heather@tax-queen.com)  
303-755-0528

**\*\*Must have signed signature form  
before I can electronically file your  
return. \*\***

**If you have an email address, I will  
request a signature via DocuSign.**

**THIS IS TO HELP YOU GATHER YOUR INFORMATION,  
PLEASE CALL IF YOU NEED ASSISTANCE!!!**

# TAX ORGANIZER

NAME \_\_\_\_\_

WAGES \_\_\_\_\_ **W-2's and 1099's**

INTEREST  
EARNED \_\_\_\_\_

DIVIDENDS \_\_\_\_\_

STATE TAX REFUNDS \_\_\_\_\_

PENSIONS \_\_\_\_\_

SOCIAL SECURITY \_\_\_\_\_

UNEMPLOYMENT \_\_\_\_\_

TIPS \_\_\_\_\_

**If you have any income or expenses in the areas listed below and need further assistance, please call!!**

**FARM**

**S CORPORATIONS**

**PARTNERSHIP (K-1)**

**SALE OF STOCKS**

**SALE OF RESIDENCE** **Need settlement sheet**

**DEDUCTIONS:**

STUDENT LOAN INTEREST \_\_\_\_\_

IRA **(Include ROTH contributions, please specify)** \_\_\_\_\_

HOME MORTGAGE INTEREST \_\_\_\_\_

**MORTGAGE INSURANCE PREMIUMS** \_\_\_\_\_

**REAL ESTATE TAXES**(for everyone!!!) \_\_\_\_\_

SALES TAX **(Autos need sales receipt)** \_\_\_\_\_

LOCAL HEAD TAX \_\_\_\_\_

OWN TAX CARS \_\_\_\_\_

HEALTH INSURANCE PREM. \_\_\_\_\_

LONG TERM CARE INS. \_\_\_\_\_

MEDICAL EXPENSES \_\_\_\_\_

CHARITY: CASH \_\_\_\_\_

GOODS **(See www.satruck.org donation value guide) Take pictures to prove donations!!**

REFINANCE POINTS \_\_\_\_\_

DAY CARE PAID OUT:

NAME: \_\_\_\_\_ ADDRESS: \_\_\_\_\_ SSN: \_\_\_\_\_

UNION DUES \_\_\_\_\_

EMPLOYEE BUSINESS EXPENSES \_\_\_\_\_

**SMALL BUSINESS:**

INCOME:

INCOME FROM CLIENTS \_\_\_\_\_

INTEREST ON BUSINESS A/C \_\_\_\_\_

EXPENSES:

ADVERTISING \_\_\_\_\_

INSURANCE \_\_\_\_\_

INTEREST ON BUSINESS LOANS \_\_\_\_\_

LEGAL FEES \_\_\_\_\_

ACCOUNTING FEES \_\_\_\_\_

EQUIPMENT RENT \_\_\_\_\_

SUPPLIES \_\_\_\_\_

GIFTS \_\_\_\_\_

DUES AND PUBLICATIONS \_\_\_\_\_

EDUCATION \_\_\_\_\_

PHONE SERVICES \_\_\_\_\_

OFFICE EXPENSES \_\_\_\_\_

OUTSIDE LABOR **(File 1099Misc if needed)** \_\_\_\_\_

EQUIPMENT PURCHASES (ITEMIZE)

**AUTO EXPENSES:**

BEGIN/END MILES \_\_\_\_\_

BUSINESS MILES \_\_\_\_\_

INTEREST ON BUSINESS AUTO LOAN OR  
LEASE PAYMENTS \_\_\_\_\_

IF ACTUAL: GAS \_\_\_\_\_

REPAIRS \_\_\_\_\_

INSURANCE \_\_\_\_\_

LICENSE \_\_\_\_\_

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