THE TAX COMPANY

Your Best Return is Our Main Concern!

1173 S. 250 W. Suite 201 • St. George, UT 84770 • telephone: (435) 674-9754 • fax: (435) 215-2043 • www.taxcompany.com

Tax Organizer

Name		
	Tax Year	-

ESTIMATED TAX COMPUTATION

- Office use only -

Ordinary Income Business Income	Federal Tax	State Tax
Capital Gain (Loss)		(AGI x 5%)
AGI		(AGI X 370)
Std or Itemized Sec 199A Ded Taxable		
Income Tax S/E Tax		
Child Tax Credit EIC		(20-4, 30-3, 40-2, 50-1)
Net Tax Withholding		
Due (Refund)		

Providing the applicable information, you will assist in reducing your taxes and help us to keep your tax preparation fee low.

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 THE TAX COMPANY
 INCOME
 PAGE 1

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				PERSO	DNAL DA	TA (New Clent	s Only)		
								-	
NAME					OCCUPATION		SOCIAL SECURITY N	IO. DAT	E OF BIRTH: mm/dd/yyyy
SPOU	ISE				OCCUPATION		SOCIAL SECURITY N	IO. DAT	E OF BIRTH: mm/dd/yyyy
4000				017	D/		07475	710	New Address \Box
ADDR	ESS \			CI	ΙΥ		STATE	ZIP	
TELE	PHONE					E-MAIL ADDRES	SS		
		WAG	ES, RE	TIREN	MENT & I	UMEMPLOY	MENT INCO	ME	(Bring W-2 Forms)
T/S		Employ	yer			Wages	Federal W/H	State W/H	
				TERE	ST & DI	VIDEND INC			1099 & K-1 Forms)
T/S	Type	Name	of Payer			Ordinary	Qualified	Capital Gain	<u> </u>
					OTHER	RINCOME			
Alin	nony Re	ceived (not child support)			Social Secu	urity Income (Ta	axpayer)	
Roy	alty Inco	ome				Medicare	Part B/D Withheld	<u></u>	
		/innings					ax Withheld		
		rds or bonuses					urity Income (S		
		cluded on W-2's)		-		Medicare Part B/D Withheld Income Tax Withheld			
Last Year's State Refund Prior Year NOL			Other Income						
					DEPE	NDENTS			
		Name	Date of	f Birth		ecurity Number	Relationship	Daycar	e/Tuition
					-	-			
					_	-			
					-	-			
					-	-			
					_	-			
				1	-	-			

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ADJUSTMENTS & CREDITS

DEDUCTIONS

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ITEMIZED DEDUCTIONS

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	Taxpayer	Spouse	I I -			WIEDICAL	T
ligher Education Exp				Rx, Copays, Doc	tors & Hosp	itals	
Books		_		Dental & Vision			
Type of Credit	AOC ☐ Lifetime ☐	AOC Lifeti	me□				
Student Loan Interest				Medical Miles:			
		-		Medical Insuranc	e Premiums	(Page 1)	
Retirement Contribution	าร					TAVEO	
Traditional IRA						TAXES	
ROTH IRA		_		Real Estate Taxe			
				Γaxes on Other L			
Health Savings Acct C				State and Local I	ncome Taxe	es	
D	istributions (1099S	A)					
Child Care Expense						NTEREST	
Provider: Name & Addre	ss Tax ID Number	· Amout pa	oid	Home Mortgage			
rovidor. Name a riadro	oo Tax 12 Tambor	rimoat pa					
	_						
	_						
inergy Credits					CHAR	ITABLE GIVING	
OtherCredits		-		CASH GIFTS			
-		-		Church			
-							
Alimony Paid (Pre 2019	1			Miles			
Name & SSN	,		— I I I	NON- CASH GIFTS			
Date of Divorce			-				
HEALTH IN	ISURANCE (N	larketplace)		MI	SCELLAN	IEOUS DEDUCTION	DNS
Annual Premium (Atta	ch form 1095-A)						
Second Lowest Cost S	ilver Plan						
Advance Premium Tax	Credit			Sambling Losses			
		-					
	CAPITA	L GAINS AN	ID LOSSES	(Including V	irtual Curr	rency)	
		1	I		okerage sta	atement for stock sa	
Description of Pr	operty Sold	Date Purch	Date Sold	Sales Price		Cost Basis / N	otes
nstallment Sales	Profit	% Profit	%		ESTIMAT	TED PAYMENT	S
Sales Price					Date	Federal	State
Cost Basis				1st Qtr			
Date Bought		<u> </u>		2nd Qtr			
Date Sold				3rd Qtr			
Date Solu							
				4th Otr			
Principal Received Interest Received				4th Qtr Extension			

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BUSINESS

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BUSINESS	INCOME (LOSS)	
	•	_
		TAX-ID Number (If App
BUSINESS NAME		
PRINCIPAL BUSINESS ACTIVITY	ENTITY TYPE	START DATE
Accounting method:		Section 199A Service Business
INCOME	<u> </u>	ost of Goods Sold
Gross Income	Inventory at start of year	r
Other	Purchases for the year	
Other	Less personal use	
Discounts and Allowances	Other Adjustments	
Sales Tax Collected (Not included in Gross)	Inventory at end of year	
EXPENSES	A	utomobile Expense
Wages (Officers)	☐ Accountable (Enitit	y) Non-Accountable (Sch C
Wages (Employees)		
Employee Benefit Programs	Business Miles:	
Advertising	or	
Bank Fees	Actual Costs:	
Computer and Internet	Purchase/Lease	
Continuing Education	Fuel	
Dues & Subscriptions	Insurance (Auto)	
Freight Charges	Repairs	
Insurance (General Liabiality)		
nsurance (Health)		
Interest Expense		Balance Sheet
Office Expenses	Beginning Bank Balance	
Pension & profit-sharing	Ending Bank Balance	
Professional Fees	Business Assets (Purch	ased or Disposed)
Rent (Building)		
Rent (Equipment)		
Repairs & Maintenance		
Subcontracted Labor	Business Loans	
Supplies		
Taxes & Licenses		
Telephone & Internet	Property Distributions	
Travel (Airfare and Lodging)		
Meals (In Town)	Home Office	(Requires Regular & Exclusive use)
Meals (Per Diem)	Date started or stopped	
Fools	Purchase price of home	
Uniforms	Improvements	
	Square footage: Office:	Entire Home:
	Rent	Maintenance
	Utilities	Other
	Insurance	Other

Closing Costs

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 THE TAX COMPANY
 RENTAL
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INCOME AND EXPENSES FROM REAL ESTATE RENTAL PROPERTY					
ERTY:					
	COST B	ASIS	START DATE		
	333. 2.	.0.0	0.7.4.1. 57.1.2		
	COST BASIS				
	COST B.	ASIS	START DATE		
	COST R	ACIC	CTART DATE		
DDODEDTY A			START DATE PROPERTY D		
FROFERITA	FROFERITE	PROPERTY	FROFERITO		
DRODERTY A	PPOPERTY R	DRODERTY C	PROPERTY D		
PROPERTIA	PROPERTIE	PROPERTY	PROPERTIE		
			1		
			1		
		COST BACCOST B	COST BASIS COST BASIS COST BASIS COST BASIS PROPERTY A PROPERTY B PROPERTY C		