

Franklin P Sparkman, JR., CPA, PA
TAX INFORMATION ORGANIZER
(Please Print)

File out the name & Address section only if you are new or your Info has changed

NAME _____

ADDRESS _____

EMAIL: _____

TELEPHONE: (W) _____ (Home or Cell) _____

TAXPAYER: SSN _____ BIRTHDATE _____

SPOUSE: SSN _____ BIRTHDATE _____

DEPENDENTS:

<u>FULL NAME</u>	<u>SOCIAL SECURITY NO.</u>	<u>BIRTHDATE</u>	<u>RELATIONSHIP</u>

PLEASE BRING ALL W-2 FORMS AND ANY 1099 FORMS WITH YOU!!!!

IF YOU HAVE INCOME FROM PARTNERSHIPS AND/OR S-CORPATIONS, ATACH K-1'S, REAL ESTATE, ETC.:

STATE TAX REFUND from last year _____

UNEMPLOYMENT INCOME: TAXPAYER _____ SPOUSE _____

SOCIAL SECURITY INCOME TAXPAYER _____ SPOUSE _____

MISCELLANEOUS INCOME: TAXPAYER _____ SPOUSE _____

INTEREST INCOME:

<u>PAYER</u>	<u>AMOUNT</u>	<u>TAXPAYER, SPOUSE, JOINT</u>

DIVIDEND INCOME: Bring in your end brokerage statement and/or 1099-DIV

STOCK SALES: Bring in your end brokerage statement and/or 1099

RECEIPT OF PENSIONS, PROFIT SHARING, IRA DISTRIBUTIONS, OR WITHDRAWALS: Please bring your 1099R's

ADJUSTMENTS TO INCOME:

CONTRIBUTION TO IRA:	TAXPAYER _____	SPOUSE _____
CONTRIBUTION TO ROTH IRA:	TAXPAYER _____	SPOUSE _____
CONTRIBUTION TO SEP:	TAXPAYER _____	SPOUSE _____
PENALTY OF EARLY WITHDRAWAL OF SAVING	TAXPAYER _____	SPOUSE _____
TEACHER EXPENSES (\$250 MAX)	TAXPAYER _____	SPOUSE _____

Bring Your HSA 1099 and let me know if all you withdrew out of your HSA was for medical

TUITION PAID IN 2013 _____ (mark one) freshman _____ sophomore _____ junior _____ senior _____
Semester Hours Spring _____ summer _____ fall _____

BRING THE 1098-T WITH YOU Who is tuition paid for: _____

MEDICAL DEDUCTIONS:

PRESCRIPTION MEDICINE AND DRUGS _____

MEDICAL INSURANCE PREMIUMS _____

DOCTOR, DENTIST, HOSPITAL _____

OTHER: _____

MEDICAL MILEAGE: _____ MILES

TAXES

REAL ESTATE _____

PERSONAL PROPERTY TAXES _____

QUARTERLY ESTIMATED TAXES PAID FOR TAX YEAR 2014: FEDERAL _____ STATE _____

ADDITIONAL STATE INCOME TAXES PAID IN 2014 _____

IF YOU PAID YOUR LAST STATE ESTIMATED PAYMENT IN 2015 FOR 2014 LIST IT HERE _____

INTEREST EXPENSE:

HOME MORTGAGE(S) TO _____ INTEREST PAID _____

DEDUCTIBLE POINTS _____

2nd MORTGAGE PD TO _____ INTEREST PAID _____

INVESTMENT INTEREST _____

***NOTE: IF YOU REFINANCED OR SOLD YOUR HOME THIS PAST YEAR, PLEASE BRING YOUR CLOSING STATEMENT INFORMATION WITH YOU.**

CONTRIBUTIONS:

CHURCH NAME/ORGANIZATION NAME

CASH OR OTHER?

AMOUNT

CHARITY MILEAGE _____ MILES

***NOTE TO ALL AIRLINE EMPLOYEE'S SEE NOTE BELOW:**

PLEASE PUT MISCELLANEOUS WORK EXPENSES ON THE ADDITIONAL WORKSHEET PROVIDED

OTHER MISCELLANEOUS DEDUCTIONS:

UNION DUES _____

SMALL TOOLS _____

TAX RETURN FEE _____

JOB EDUC. /SEMINAR EXP. _____

PROF. DUES _____

UNIFORMS/MAINT. _____

SAFETY EQUIP. _____

SAFETY DEP BOX _____

BUSINESS MILEAGE Miles _____

OTHER _____

CHILD CARE EXPENSES:

NAME & ADDRESS OF PERSON PAID

SSN/FIN

AMOUNT PAID

Amount of Out of state purchases (i.e. Catalog, Internet, and etc.) _____

AIRLINE EMPLOYEE MISCELLANEOUS EXPENSE

	FAA medical exam		Home dry cleaning expenses of uniform
	Passport application fees		Alterations
	Passport photo		Belt
	Foreign visa costs		cleaning / dry cleaning (per week)
	Education fees for second language (check IRS guidelines)		cleaning / laundering (per week)
	Special company assessments (i.e. merger etc.)		Uniform essential clothing
	Logbook or organizer		Uniform jacket
	Bid service fees (Do not include services available to the general public, job required)		Uniform pants
	Union dues		Uniform dress
	Cockpit and jet bridge key		Uniform apron/serving clothes
	Company business cards		Uniform sweater
	Headset for cockpit		Uniform skirt
	Corkscrew		Uniform blouse
	Manuals		Uniform tie
	Pager (for job related use)		Uniform hat
	Business related long distance calls		Epaulets
	Pager rental fee (job required)		Scarves
	Flight supplies/equipment		Hat
	Currency converter		Uniform accessories - (airline logo items and wings)
	ATM fees on layovers out of banking area		Shoes
	Safety equipment (job required)		Support hose
	Drug Testing expenses		Repairs of shoes
	Foreign Visa Expenses		Coat
	Professional publications		Garment bag
	Mail expenses (company related)		Luggage
	ID/Badge holder		luggage tags
	Loss of license insurance		Portable Alarm Clock
	Kit bag		Portable Blow Dryer
	Flashlight		Portable Door Alarm
	Batteries		Voltage converter
	Misc. work supplies		
	Transportation between places of lodging or business and places where meals are taken		