

PERSONAL TAX ORGANIZER

Taxpayer Information	Spouse Information
Name _____ Age _____	Name _____ Age _____
Social Security No. _____	Social Security No. _____
Occupation _____	Occupation _____
Street Address _____	City _____ State _____ Zip Code _____
Phone No. (_____) - _____	

Dependents				
Name	Birth Date	Social Security No.	Relationship	Months Home
_____	____/____/____	_____	_____	_____
_____	____/____/____	_____	_____	_____
_____	____/____/____	_____	_____	_____

Income
Wages(W-2s) _____ Misc. (1099) _____
Unemployment Compensation _____
Social Security Benefits You _____ Spouse _____
Other _____

Estimated Tax Payments
Due 4/15 \$ _____
Due 6/15 \$ _____
Due 9/15 \$ _____
Due 1/15 \$ _____

Adjustments to Income
IRA Contributions You \$ _____ Spouse \$ _____
Moving Expenses \$ _____
Student Loan Interest \$ _____

Medical
Doctors/Dentists \$ _____
Prescription Drugs \$ _____
Insurance Premiums \$ _____

Taxes
Real Estate Taxes \$ _____
Property Taxes \$ _____
Other Taxes \$ _____

Interest
Home Mortgage \$ _____
Home Mortgage \$ _____
Other \$ _____

Contributions
Cash \$ _____
Other \$ _____

Miscellaneous
Union Dues \$ _____ Safety Deposit Box \$ _____
Tax Return Fees \$ _____ Tools/Equip. \$ _____

Interest Income	
Source	Amount
_____	\$ _____
_____	\$ _____
_____	\$ _____

Dividend Income	
Source	Amount
_____	\$ _____
_____	\$ _____
_____	\$ _____

AFTE Financial Services
 9445 W Little York rd.
 Houston, TX 77040
 (713) 856-9000
 Fax (713) 856-9008

Child & Dependent Care

Person or Organization who provided the care

Name	Address	Soc. Sec. Or EIN #	Amount
			\$
			\$

Securities or Property Sold

Description	Date Acquired	Date Sold	Sales price	Cost
			\$	\$
			\$	\$
			\$	\$

Rental Income & Expense

Property	Address
1	
2	
3	
4	

Property	1	2	3	4
Income				
Advertising				
Auto and Travel				
Cleaning and Maintenance				
Commissions				
Insurance				
Legal and Professional Fees				
Management Fees				
Mortgage Interest				
Other Interest				
Repairs				
Supplies				
Taxes				
Utilities				
Other				