Kiley & O'Toole Tax Service **fax: 617-849-8031 email: taxes@kileyotoole.com**

Tax Organizer

This organizer helps us to prepare accurate & timely tax returns. Please take time to review and complete all that applies to you. Thank you!

For Tax Year ___________

Name_______________________________________ **Phone #** ___________________________**Email** ______________________________

BASIC INFORMATION (If left blank, we assume a NO answer) Please provide details at bottom of page to all YES responses	yes	no
Did you change your mail address or residence since we prepared your last tax return?		
Any possible change in dependents claimed compared to prior year, if yes, please provide details and explain why.		
Any changes in your filing status? Got married, filing separately, or finalized a divorce?		

Direct Deposit Information

If we should use the bank info provided to us last year, then please initial here __________. (Note: Attach a voided check and complete below Only if account is different than last year or a new client)

Bank Name:____

Deposit to (check one) ☐ Checking ☐ Savings

Estimated Taxes Paid (not Real Estate taxes or withholding on W-2/1099)

Due Date	Federal Taxes		State Taxes	
	Date Pd	Amount	Date Pd	Amount
APRIL				
JUNE				
SEPT.				
JAN.				

Provide us with ALL the Tax Reporting forms you receive AND check the box for the forms & info you are providing.

My Earnings & Other Income

- ❑ Wages: provide Form W-2
- ❑ Retirement: provide Form1099-R
- ❑ Social Security: provide Form 1099-SSA
- ❑ Unemployment: provide Form 1099-G
- ❑ Gambling Winnings: provide W-2G
- ❑ Other Income: Form__________
- ❑ Dividends: provide Form 1099-DIV
- ❑ Interest: provide Form 1099-INT
- ❑ Stock Sales: provide Form1099-B
- ❑ Miscellaneous Income: provide Form 1099-MISC
- ❑ Sale of R.E.: provide 1099-S (attach closing docs-2 pages)
- ❑ Other Income: Form__________

Health Insurance (must provide to avoid tax penalty)

- ❑ Providing Form 1095 A, B or C
- ❑ Providing Form MA 1099-HC
- ❑ No Health Insurance (penalty may apply) ❑ I have Medicare

College Tuition & Loan Interest

- ❑ Form 1098-T: tuition for each student
- ❑ Form 1098-E: student loan interest

My Itemized Deductions

NOTE: The 2018 Tax Act increased the Standard Deduction to approx. $12,000 for Single filers, $24,000 for Married filers, and $18,000 for Head of Household. If the total of the following deductions items do not exceed your Standard Deduction, then you will not be using itemized deductions. However, still provide us your Form 1098 for mortgage interest & real estate taxes paid. NOTE: The new Tax Act **eliminated deductions for employee expenses, such as union dues, license cost, auto expense, clothing**,etc., and other misc. deductions, such as safe deposit box, tax prep and investment expense.

- ❑ Mortgage Interest: provide Form 1098(s)
  (your paid real estate taxes often found on your Form 1098)
- ❑ Real Estate Taxes-principal residence: $______________
- ❑ Real Estate Taxes-2nd home/investment: $______________
- ❑ Excise or Personal Property Tax Paid: $ _____________

NOTE: State tax withheld from your income reporting forms will be added to all of the itemized deductions in this section.

- ❑ Contributions by Check/CrCard: $_______________
- ❑ Noncash Contributions: $ _____________
  (attach receipt if above $500, required to complete the tax form)
- ❑ Unreimbursed Medical Expense: $_____________
  (NOTE: Only medical expense above 7.5% of your income is deductible)
- ❑ Gambling Losses: $_____________
  (Limited to amount of winnings)

MASS. CIRCUIT BREAKER CREDIT

Eligible only if you were 65 or older during the year. Please complete all the following information. We will check your eligibility based on your income.

Real Estate Taxes Paid $______________ Property Tax Assessed Value $_________________ Water/Sewer paid $______________

Adjustments to Income

Alimony received $______________ paid $______________
(only if divorce/separation agreement was executed before Jan 1, 2019)

Educator Expenses $ _____________ (max deduction is $250)
(qualified expenses for teachers include books and supplies)

Notes or Info for the TAX PREPARER (use back side if necessary)