

**Prepared By:**

Marcia M Queen  
PO Box 950  
Gilroy, CA 95020

## **Tax Organizer For 2010 Income Tax Return**

**Prepared For:**

. .  
,

This Tax Organizer can be used to help identify the information needed to prepare your 2010 income tax return. Enter your 2010 information and if you need additional space, enclose a separate sheet with the details. If available, your prior year information has been included for you to use as a reference. You do not need to make 2009 entries.

Please return this organizer along with all Form W-2's, 1099's, and any other information you feel will assist with the preparation of your 2010 income tax return.

If you have any questions, please feel free to contact us at (408)848-5645.











**BUSINESS INCOME AND EXPENSES**

Indicate the owner of this business:  Taxpayer  Spouse  Joint

Business Name: \_\_\_\_\_

Business product or service: \_\_\_\_\_

Business Address: \_\_\_\_\_

City, State, and Zip Code: \_\_\_\_\_

Did you start or acquire this business during 2010?  Yes  No

Accounting Method:  Cash  Accrual  Other (describe) \_\_\_\_\_

Method used to value inventory:  Cost  Lower of cost or market  Other (describe) \_\_\_\_\_

<b>Income and Cost of Goods Sold</b>	<b>2010 Amount</b>	<b>2009 Amount</b>
Gross receipts or sales . . . . .		
Returns and allowances . . . . .		
Other income (enclose description) . . . . .		
Inventory at beginning of year . . . . .		
Purchases less cost of items withdrawn for personal use . . . . .		
Cost of labor . . . . .		
Materials and supplies . . . . .		
Other costs . . . . .		
Inventory at end of year . . . . .		

<b>Expenses</b>	<b>2010 Amount</b>	<b>2009 Amount</b>		<b>2010 Amount</b>	<b>2009 Amount</b>
Advertising . . . . .			Taxes and licenses . . . . .		
Commissions and fees . . . . .			Travel . . . . .		
Contract labor . . . . .			Meals and entertainment . . . . .		
Depletion . . . . .			Utilities . . . . .		
Employee benefits . . . . .			Wages . . . . .		
Insurance (other than health) . . . . .			Other: _____		
Mortgage interest . . . . .			_____		
Other interest . . . . .			_____		
Legal and professional fees . . . . .			_____		
Office expenses . . . . .			_____		
Pension and profit sharing . . . . .			_____		
Rent - Vehicle, machinery . . . . .			_____		
Rent - Other . . . . .			_____		
Repairs and maintenance . . . . .			_____		
Supplies . . . . .			_____		

**Vehicle Information**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_

Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_

Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2010**  
(New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales Price

**Business Use of Home**

Area used exclusively for business \_\_\_\_\_ Total area of home \_\_\_\_\_

Was the home used as a day care facility?  Yes  No Date home placed in service \_\_\_\_\_

Casualty losses \_\_\_\_\_ Insurance \_\_\_\_\_ FMV of home \_\_\_\_\_

Mortgage interest \_\_\_\_\_ Repairs and maintenance \_\_\_\_\_ Value of land \_\_\_\_\_

Real estate taxes paid \_\_\_\_\_ Utilities and other expenses \_\_\_\_\_



**RENTAL AND ROYALTY INCOME AND EXPENSES**

Indicate the owner of this property:     Taxpayer     Spouse     Joint

Description of property \_\_\_\_\_  
 Location of property \_\_\_\_\_

Did you or your family use this property during the tax year for personal purposes for more than the greater of: (a) 14 days, or (b) 10% of the total days rented at fair market value?     Yes     No

Did you meet the Active Participation requirements for this property?  
 (To meet these requirements, you must have participated in making management decisions or arranged for others to provide services in a significant and bona fide sense. Such management decisions include approving new tenants, deciding on rental terms, approving repair expenditures, or other similar decisions)     Yes     No

Was this property fully disposed of during 2010?     Yes     No

Income	2010 Amount	2009 Amount
Rents received . . . . .		
Royalties received . . . . .		

Expenses	2010 Amount	2009 Amount
Advertising . . . . .		
Cleaning and maintenance. . . . .		
Commissions . . . . .		
Insurance . . . . .		
Legal and other professional fees . . . . .		
Management fees . . . . .		
Mortgage interest paid to banks. . . . .		
Other interest. . . . .		
Repairs . . . . .		
Supplies . . . . .		
Taxes . . . . .		
Utilities . . . . .		
Other _____		
_____		
_____		
_____		

**Vehicle Information**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_

Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_

Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_

Travel expenses \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2010**  
 (New clients, enclose detailed listing of all depreciable assets.)

Asset description	Date acquired	Purchase price	Date sold	Sales price







**ITEMIZED DEDUCTIONS (continued)**

	2010 Amount	2009 Amount
<b>Casualty and Theft Losses</b> Casualty and theft losses (enclose supporting documentation with description of the casualty, description of the property, date acquired, cost of property, insurance reimbursements, and the fair market value before and after the casualty) . . . . .		

**Miscellaneous Deductions**

**Unreimbursed Employee Business Expenses**      **T = Taxpayer   S = Spouse**

**Vehicle Information   T or S**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_  
 Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_  
 Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_  
 Travel expenses \_\_\_\_\_

**Vehicle Information   T or S**

Vehicle description \_\_\_\_\_ Date placed in service \_\_\_\_\_ Cost or basis \_\_\_\_\_  
 Business miles \_\_\_\_\_ Commuting miles \_\_\_\_\_ Other miles \_\_\_\_\_  
 Actual expenses such as gas, oil, repairs, etc \_\_\_\_\_ Parking fees and tolls \_\_\_\_\_  
 Travel expenses \_\_\_\_\_

**Sales, Purchases, and Disposition of Assets in 2010**

(New clients, enclose detailed listing of all depreciable assets.)

T S	Asset description	Date acquired	Purchase price	Date sold	Sales price

**Business Use of Home   T or S**

Area used exclusively for business \_\_\_\_\_ Total area of home \_\_\_\_\_  
 Date home placed in service \_\_\_\_\_  
 Casualty losses \_\_\_\_\_ Insurance \_\_\_\_\_ FMV of home \_\_\_\_\_  
 Mortgage interest \_\_\_\_\_ Repairs and maintenance \_\_\_\_\_ Value of land \_\_\_\_\_  
 Real estate taxes paid \_\_\_\_\_ Utilities and other expenses \_\_\_\_\_

	2010 Amount	2009 Amount
Unreimbursed employee business expenses (such as union dues, small tools, travel, etc) . . . . .		
Tax preparation fees . . . . .		
Other miscellaneous expenses (such items include safe deposit box rental, certain appraisal fees, expenses related to investment income, etc...enclose supporting documentation) . . . . .		
<b>Other Miscellaneous Deductions</b> Other miscellaneous deductions (such items include gambling losses, estate tax deduction, amortization of bond premium, etc... enclose supporting documentation) . . . . .		

