| ***Mayorga Tax Pros* Tax Return Organizer 2024** | | | |
| --- | --- | --- | --- |
| We will prepare the federal and applicable state income tax returns to satisfy your U.S. tax compliance needs. We will prepare these returns based on information you furnish to us. It is your responsibility to provide us with all the correct information necessary for the preparation of complete and accurate income tax returns. I agree with these terms & conditions.  Business Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |
| **Income** | **ANNUAL TOTAL** | **Rental Property Expenses** | **ANNUAL TOTAL** |
| W-2 Forms |  | Rents Received |  |
| 1099 Forms |  | Advertising Expenses |  |
| Interest from Banks etc. |  | Auto & Travel Expenses |  |
| Dividends |  | Cleaning & Maintenance |  |
| Taxable Refunds |  | Commissions |  |
| Alimony Received |  | Insurance |  |
| IRA Distribution |  | Legal & Professional Fees |  |
| Stock Including Buy and Sale Dates |  | Management Fees |  |
| Pensions |  | Mortgage Interest Paid |  |
| Real Estate Rental Information |  | Other Interest Paid |  |
| Unemployment Compensation |  | Repairs |  |
| Social Security Benefits |  | Supplies |  |
| Other Income |  | Taxes |  |
|  |  | Utilities |  |
| **Deductions** | **ANNUAL TOTAL** | **Business Expenses** | **ANNUAL TOTAL** |
| IRA Contributions |  | Total Income |  |
| Student Loan Interest Paid |  | Advertising Expenses |  |
| Tuition Expense |  | Car & Truck Exp |  |
| Jury Duty Pay |  | Commissions Paid |  |
| Medical Expenses |  | Contract Labor |  |
| Dental Expenses |  | Equipment Purchases |  |
| Prescription Expenses |  | Insurance |  |
| Real Estate Taxes Paid |  | Legal & Professional Fees |  |
| Auto Registration Taxes Paid |  | Office Expenses |  |
| Home Mortgage Interest |  | Rent |  |
| Points Paid |  | Business Property |  |
| Mortgage Insurance Premiums |  | Repairs |  |
| Church Contributions (bring statement) |  | Supplies |  |
| Misc. Contributions (bring statements) |  | Taxes & Licenses |  |
| Goodwill, Salvation Army etc (bring receipt) |  | Travel |  |
| Documentation of Loan Refinance |  | Meals |  |
| Tax Preparation Fee |  | Telephone |  |
| **Non Reimbursed Job Related Expenses** | **ANNUAL TOTAL** | Utilities |  |
| Union Dues |  | Postage |  |
| Cell Phone Expenses (Listed Property) |  | Bank Fees |  |
| Cell Phone Purchase (Listed Property) |  | Janitorial |  |
| Computer Purchase (Listed Property) |  | Uniforms |  |
| Internet Expense |  | Inventory Beginning of Year |  |
| Tools Purchased |  | Inventory End of Year |  |
| Other Equipment Purchase |  | Other Expenses (attach sheet) |  |
| Parking, Tolls, Trains, Bus etc. |  | Cell phone for Business |  |
| Travel, Lodging, Airplane, Car Rental |  | Auto for Business Miles |  |
| Meals |  |  |  |
| Total Miles Driven |  |  |  |
| Work Related Miles (from work to job sites) |  | **Childcare** | **ANNUAL TOTAL** |
| **Stock Sales & Purchase** | **ANNUAL TOTAL** | First & Last Name |  |
| Stock Name |  | Address of Care Provider |  |
| # of Shares Sold & Sales Price |  | Social Security Number / EIN |  |
| Acquired Date |  | Child Care Expenses |  |
| Sold Date & Cost or Basis of Stock |  | Name of Child Care Provider |  |