Brown Financial LLC

Simple Tax Organizer

Items to provide for Initial Tax Interview if Applicable:

Prior Year Tax Return (If other preparer)	Contributions
W-2s and 1099s	Medical and Dental Expenses
Brokerage Statements	Self-Employment Income Records
Rental Income Records	Other Government Forms

BASIC TAXPAYER INFORMATION

Name		Spouse	
SS#		Spouse SS #	
Occupation		Occupation	
Birthday		Birthday	
Home Address			
Email Address		Phone #	

Filing Status (Circle One): Single Joint HH Other

Dependents

Name	Birthday	SS#	# of Months Living with you

INCOME INFORMATION

Wages , Tips and Salaries (attach W-2s)

Interest Income **1099-INT**

List by Source	Amount

Dividend Income **1099-DIV**

List by Source	Amount

Other Income **Pensions, IRS, Unemployment, Social Security, Alimony**

List by Source	Amount

ADJUSTMENTS TO INCOME AND DEDUCTIONS

(Attach a separate sheet if you need additional space)

Contributions to Retirement Plan

Type of Plan	Amount

Brown Financial LLC

Child Care Expenses

(Attach a separate sheet if you need additional space)

Name	
Address	
ID#	

Unreimbursed Medical Expenses	Amount
Prescriptions	
Doctor and Dental	
Insurance Premiums	
Medical Miles Driven	
Other	

Taxes	Amount
Real Estate	
Other	

Interest Expense

Mortage (Homestead and Second Home Only)	Amount

Cash Contributions

(Attach a separate sheet if you need additional space)	Amount

Non-Cash Contributions

(Attach a separate sheet if you need additional space)	Amount

Miscellaneous Deductions

(Attach a separate sheet if you need additional space)	Amount
Unreimbursed Employee Business Expenses	
Tax planning & Preparation Fee	
Investment Expenses	
Safety Deposit Box	
Tuition	
Student Loan Interest	
Business Publications/Subscriptions	
Professional & Union Dues	

Estimated Tax Payments		Date of Payment	Amount
Due Dates:	15-Apr		
	15-Jun		
	15-Sep		
	15-Jan		