



BRYSON LAW FIRM, P.C.

estates | tax | asset protection | elder law

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TAX ORGANIZER

Note: In addition to answering the following questions, please provide copy of prior year tax return (if not prepared by us) and tax forms for compliance year (e.g. Forms 1099, W-2, 1098)

Your Full Name: _____
(Please Print)

Nickname: _____ Date of Birth: _____ SS#: _____ - _____ - _____

Employer: _____ Position: _____

Full Name of Spouse (if any): _____
(Please Print)

Nickname: _____ Date of Birth: _____ SS#: _____ - _____ - _____

Spouse's Employer: _____ Position: _____

Address: _____

County City State Zip

Home Phone Work Phone Fax Number

Cell Phone E-mail Address

What/Who referred you to us? _____

Investment Advisor (Name & Contact info): _____

Note if evidence of disability or blindness: _____

Note if contribution to Presidential Campaign or other special purpose designation: _____

DEPENDENTS

Dependent #1

Name: _____

Social Security#: _____ Date of Birth: _____

Relationship? _____ Months in home with you? _____

Education Status? _____

Dependent on another return? _____

Dependent #2

Name: _____

Social Security#: _____ Date of Birth: _____

Relationship? _____ Months in home with you? _____

Education Status? _____

Dependent on another return? _____

Dependent #3

Name: _____

Social Security#: _____ Date of Birth: _____

Relationship? _____ Months in home with you? _____

Education Status? _____

Dependent on another return? _____

Note if any dependent was adopted during tax year.

Checklist for Tax Return Preparation

Check all that apply:

- _____ Change of address, marital status, or dependents (could include elderly parents)
- _____ Last year's tax return (if we did not prepare prior year)
- _____ Carried health insurance throughout the year, if not, notify if exempt (Affordable Care Act)
- _____ Received inheritance. Not taxable (unless pre-tax assets like retirement accounts) –
But will want to acquire “basis” for purpose of future taxation.
- _____ Made estimated tax payments (indicate amounts and payment dates)
- _____ Purchase any vehicles, boats, trailers or motorcycles (note if hybrid or alternative fuel)
- _____ Suffered property loss due to theft or casualty that was not reimbursed by insurance
- _____ Made energy saving home improvements
- _____ Contribute to traditional or ROTH IRA
- _____ Took distributions from retirement account prior to age 59 ½
- _____ Rental Income from investment property

Income Related Items

- _____ Original Form(s) W-2 and 1099 with estimated taxes withheld
- _____ Form(s) 1099 R or statements reporting pension income, social security income, unemployment, or other compensation
- _____ Form(s) 1099INT/ DIV or statements reporting interest income or dividends
- _____ Form(s) 1099B or statements reporting sale of stocks or other assets
- _____ Schedule(s) K-1 from partnerships, S-corporations, estates or trusts
- _____ Rents and expenses related to investment/rental properties (Schedule E)
- _____ Revenue and expenses related to self-employment (Schedule C)
- _____ Retirement Asset (i.e. IRA, ROTH IRA, 401k) contributions, withdrawals, or conversions

Deduction Related Items

- _____ Unreimbursed business expenses (i.e. mileage, uniform, computer, tolls, tools)
- _____ Tax return fees and safe deposit box rental
- _____ Real estate property taxes paid
- _____ Mortgage interest paid
- _____ Charitable contributions – cash and non-cash / property (itemize)
- _____ Closing Settlement Statement for any property purchases, sales or refinance
- _____ Unreimbursed classroom expenses by a teacher
- _____ Education Expenses (post-secondary) – including student loan interest
- _____ Medical expenses are only deductible if exceed 7.5% of adjusted gross income (AGI)
(if so, then includes items such as: mileage driven for medical needs, chiropractor, dentures, hearing aid, dental costs, prescriptions, eye exams, eyeglasses, health insurance premiums, long-term care insurance premiums, Medicare Supplement insurance premiums, and long-term care expenses)
- _____ Ad valorem taxes paid for vehicles, boats, trailers, and motor cycles
- _____ Moving expenses if moved more than 50 miles due to employment change
- _____ Child and dependent care expenses (including summer camps and after-school activities)
- _____ Contributions to Georgia Qualified Education Account (i.e., 529 Account)

Any unusual tax situation not addressed above, please explain.
