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Organizer for 2016 Tax Year

Personal Information:

NAMES: Taxpayer/Spouse	SS NUMBER	DATE OF BIRTH	OCCUPATION

TAX ADDRESS: _____

MAILING ADDRESS: _____

HOME PHONE _____ CELL _____ Best time to call: _____

*****EMAIL ADDRESS: _____*****

Marital Status as of Dec 31 2016:

____ Single ____ Married filing joint ____ Married filing Separate ____ Head of Household
____ Same Sex Married

Blind? TP _____ Sp _____ Disabled? TP _____ Sp _____

DEPENDENTS:

Full Name	Date of Birth	SS#	Mos. Lived with You	College Student	Gross Income

CHILD CARE EXPENSES:

Name of Provider: _____ Tax ID Number-or-SS# _____
Address: _____ Amount Paid: _____
Name of Provider: _____ Tax ID Number-or- SS# _____
Address: _____ Amount Paid: _____

INCOME:

Wages, Salary Income:

How many W2's included? _____

Interest Income:

How many 1099 INT & Broker statements included? _____

Dividend Income: From Mutual Funds & Stocks—Include 1099 Div

How many enclosed? _____

INVESTMENTS SOLD: I must have this information or the entire sale will be taken as a gain! Brokerage houses will provide this info, but if they do not, you must provide it!

INVESTMENT	Date Bought/Sold	Cost	Sale Price

Please include 1099B.

Partnerships, Trust, Estate Income:

For Partnerships, Limited Partnerships, S-Corporations, Trust or Estate Income, PLEASE ENCLOSE K1's.

I.R.A. Contributions for 2016

Taxpayer Amount _____ **Date made:** _____ **Roth?** _____

Spouse Amount _____ **Date made:** _____ **Roth?** _____

Pension & Annuity Income:

Enclose 1099R

Did you or spouse receive Social Security? If so, please enclose SSA 1099.

Other Income:

Alimony _____

Unemployment _____

Scholarships _____

Gambling _____

Lottery _____

Commissions _____

Jury Duty _____

State Refund _____

Other _____

Workman's Comp _____

Unemployment _____

Rental (please call me)

Income Adjustments:

Alimony paid _____ Name & SS# _____

Student Loan Interest _____

Alimony received _____ From: _____ SS# _____

Renters Credit: Ca/NJ/Ma/other states

Annual Residential Rent: _____

Did you share? _____

Number of people (room-mates) _____

DEDUCTIONS:

Medical

Medicine: _____
Long Term Care _____
Insurance: _____
Dentists: _____
Glasses, Contacts: _____
Transportation/
Lodging Medical _____
LESS Insurance _____
& FSA Payments _____

Insurance: _____
(paid for directly by you, not payroll)
Doctors, Nurses: _____
Hospitals: _____
X-rays, Labs: _____

Mileage: _____
(to & from doc's, hospitals, facilities)

Taxes

State taxes paid by check
W/2016 return: _____
Personal Property
Taxes: _____
Auto Registration ** _____

Real Estate taxes: _____
Sales Taxes paid in a state with no state tax:

Interest

Home Mortgage: _____
Home Equity Loan: _____
Home Mortgage Paid to an
Individual: _____
Name: _____
Address: _____

Coop Mortgage: _____
Deductible Points: _____

SS#: _____

Gifts to Charity

Contributions: Paid by check, credit card, cash, payroll w/holding: _____
Contributions of Clothing, Furniture, Etc...Fair Market Value * _____

*If over \$500, the IRS requires a supporting schedule! Please include date of contribution, charity,
tax ID number, address & description of items, date of original purchase & original price.

For Donations of more than \$250, you must have receipts in your possession by the tax filing date.

Other deductions

Tax return prep fees _____ Safe deposit box _____
Investment publications _____ IRA management fees _____

Home owners credit

NJ: Block _____ Lot _____
CT: Town _____ List/Bill # _____ Date Paid _____
CT auto tax credit Town: _____ Make: _____ Year: _____
Bill Number: _____ Date paid _____ Amount _____

****Applies only to: AZ, CA, CO, CT, GA, IN, IA, ME, MA, MN, MS, MT, NE, NV, NH, OK, WA & WY.**

Job Related Moving Expenses

Miles from old home to new job: _____
Miles from new home to new job: _____

Cost of move: _____
Cost of meals/lodging: _____

Job Search Expenses

Resumes: _____
Research expenses: _____

Travel to interviews: _____

Continuing Education & College Student Credit

Student's Name	Type of Expense	Amount	Year in School

Please include 1099T from school

For NY Tuition Credit, please provide name of school: _____

Contribution to 529? State: _____ **Amount:** _____

Are you a New Flight Attendant? If so, what date did you start training? _____
Did you need to pay any expenses...hotel before arrival at training...any airfare...
Any items the company required you to buy FOR training? Please list item & cost.

Questions, Comments and Other Information:

To the best of my knowledge, the enclosed information is correct and includes all income, deductions and other information necessary for the preparation of this year's tax return, for which I have adequate records.

_____ Date _____
_____ Date _____

Do you wish Direct Deposit? **Y** **N**

Please enclose a voided check...or if it is the same account as last year, please enter name of bank, and last 4 numbers of account.

The checklist below could lead to helpful deductions. Please answer and provide supporting documents. All questions pertain to 2016 only!

- Y N Were adjustments made **by the IRS or any state** to any prior 3 years returns?
- Y N Did your martial status changes in 2016?
- Y N Did you have any new dependents in 2016?
- Y N Did you pay more than half the cost for supporting a parent?
- Y N Did you receive a distribution from a __qualified employer plan __IRA or __529?
Check all that apply.
- Y N If yes, did you roll over the distribution to an IRA? Within 60 days?
- Y N Did you buy/sell any stocks/bonds/mutual funds (not IRA) in 2016?
- Y N Did you buy/sell your home? If so, please provide us with closing statements for purchase & sale.
- Y N Did you refinance your mortgage or take an equity loan on your 1st or 2nd home?
- Y N Did you give or receive gifts more than \$14,000?
- Y N Did you have a casualty or theft loss? If so, please contact me for info I need.
- Y N Did you borrow any money to make an investment?
- Y N Did you have any income from foreign sources, not reported on 1099's? Were any Foreign taxes withheld?
- Y N Did you have a foreign bank account or security account? If yes, which country? _____
- Y N Did you have foreign bank or security accounts with over **\$10,000** in total at any time during the year?
- Y N If yes, and you live in US, was it over \$50,000(single) or \$100,000(married)?
- Y N Check yes to allow Mary Ann to discuss this return with IRS/state if necessary?
- Y N Check yes to allow Mary Ann to set your e-filing pin.
- Y N Do you want hard copy of return?

Per the IRS, you are required to keep records that will enable you to prepare an accurate & complete tax return. You are required to retain all receipts, cancelled checks, bank statements and other evidence to support amounts claimed as deductions. You must keep your records as long as they might be material in administering any IRS law. In most instances, this is 3 years after the date of filing your return.

DEDUCTIONS FOR FLIGHT CREW
Please fill in amounts, not just a check mark!

UNIFORM ITEMS

- Boots
- Ear Protector
- Hats
- Gloves
- Jackets
- Scarves
- Shoes (onboard only)
- Shoe Polish/ Shine
- Shoe Repairs
- Shirts
- Skirts
- Stockings
- Support Hose
- Sweaters
- Ties
- Misc Uniform Items

UNIFORM MAINTENANCE

- Alterations
- Cleaning
- Laundry
- Laundry Supplies
- Repairs

LUGGAGE/TRAVEL ITEMS

- ID Case
- Map Case
- Maps
- Passport Case
- Repairs
- Suitcase(s)
- Travel Bags
- Travel Case
- Port-O-Lock

Association/Union Dues

- Union Dues
- Initiation Fees
- Union Meetings
- Professional Subscriptions

COMMUNICATION/BID SERVICE

- Answering Machine
- Answering Service
- Beeper
- Bid Fees
- Extra Phone Line
- Faxes
- On Line Charges
- Pager
- Cell Phone
- Bid Service

TOOLS & EQUIPMENT

- Batteries
- Briefcase
- Business Cards
- Calculator
- Clipboard
- Computer (date purchased & cost)
- Ear Protectors
- Modem/Cable
- Notebooks
- Printer
- Safety Equipment
- Subscriptions
- Travel Books
- Flashlight

PASSPORT/PASSPORT FEES

- Immigration Fees
- Photos
- Global Entry
- Visa Fees
- Mailing Fees/Transportation

TRAINING/EDUCATION

- Books
- Language Dictionaries
- Language Tapes
- Language Courses
- Professional Publications

TRANSPORTATION

- Taxi to Short Calls
- Taxi from Mailbox Airport to Work Airport

PERSONAL ITEMS

- Haircuts
- Manicures
- Make-up
- Face Creams
- Moisturizers
- Toiletries
- Bug Spray
- Sanitizers
- FAA Physical
- Loss of License/
Medical Insurance

PLEASE INITIAL _____

MISC FEES

- Atm Fees on Layovers
- Credit Card Fees
- Exchange Fees
- If WORKING flight cancelled,
Hotel/cab/food expense

Travel summary for Per Diem Deduction

If your company gives you an end of year per diem statement (such as United), please be sure to include it. They have already filled out the form for you! If you fly domestic, the IRS has a daily rate depending on layover city, so I do need that info. If you fly international, please fill out the following time away from base sheet. Destinations are very important as you can use the state dept per diem rates. These rates vary city by city. Please list the time away from base. If you do not have the exact time, you may put in 3-day trip or 4-day trip, which ever it is. IE...Jan 2, 3, 4 FCO would indicate a 3-day trip. Jan 2, 3,4, 5 is a 4-day trip. I cannot impress upon you how important it is that you have documentation of your time away from base. If ever required, you must have proof of your layovers. A calendar is good...your monthly printed schedule with rotations is better! Flightline is great too, as well as schedule leg data.