

Year _____

TAX ORGANIZER
(SHORT VERSION)

INCOME

Wages/Salary _____

Scholarship Amount _____

Interest _____

Scholarship Amount Used for Tuition _____

Dividends _____

State Refunds Received Last Year _____

EXPENSES

Educator Expenses _____

Charitable Contributions Cash _____ **Non Cash** _____

IRA Deduction _____

Job Expenses _____

Student Loan Interest _____

Other Miscellaneous Expenses _____

Moving Expenses _____

IRA deduction _____

Estimated Taxes Paid Federal _____

Estimated Taxes Paid State _____

Other Miscellaneous Expenses: Enter the total ordinary and necessary job expenses you paid for which you were not reimbursed. (Amounts your employer included in box 1 of your Form W-2 are not considered reimbursements.)

An ordinary expense is one that is common and accepted in your field of trade, business, or profession. A necessary expense is one that is helpful and appropriate for your business. An expense does not have to be required to be considered necessary.

Examples of Other Expenses to Include Are:

- Safety equipment, small tools, and supplies you needed for your job.
- Uniforms required by your employer that are not suitable for ordinary wear.
- Protective clothing required in your work, such as hard hats, safety shoes, and glasses.
- Physical examinations required by your employer.
- Dues to professional organizations and chambers of commerce.
- Subscriptions to professional journals.
- Fees to employment agencies and other costs to look for a new job in your present occupation, even if you do not get a new job.
- Certain business use of part of your home. For details, including limits that apply, see Pub. 587.

Examples of Expenses You May Not Deduct:

- Lost or misplaced cash or property.
- Expenses for meals during regular or extra work hours.
- The cost of entertaining friends.
- Commuting expenses. See Pub. 529 for the definition of commuting.
- Travel expenses for employment away from home if that period of employment exceeds 1 year.
- Travel as a form of education.
- Expenses of attending a seminar, convention, or similar meeting unless it is related to your employment.
- Club dues. See Pub. 529 for exceptions.
- Fines and penalties.
- Expenses of producing tax-exempt income.

Comments:
