

# Individual Tax Filing Organizer

Category	Item	Amount	Notes
<b>Personal Info</b>	Full Name		
	Social Security Number (SSN)		
	Filing Status		Single/Married, etc.
	Dependents		Names, ages, relationship
<b>Income</b>	Wages		W-2 Forms
	Self-Employment Income		1099 Forms
	Interest/Dividends		1099-INT/DIV
	Retirement Income		1099-R
	Capital Gains/Losses		1099-B
<b>Adjustments</b>	Student Loan Interest		
	IRA/HSA Contributions		
<b>Deductions</b>	Medical Expenses		
	Mortgage Interest		1098 Form
	Property Taxes		
	Charitable Contributions		
	Child/Education Tax Credits		
<b>Credits</b>	Earned Income Tax Credit		
<b>Other Payments</b>	Estimated Tax Payments		
	Refund/Credit from Last Year		