TruckerTaxes.com
Professional Tax Services for the Trucking Industry

763-447-3991
303 Credit Union Dr. Suite 7
Isanti, MN 55040

2015 Tax Organizer

Instructions (please read)

Five Quick Points About This Document:

1. Use this organizer to provide us with as much information about your tax situation as possible. Try to be thorough. You may skip the parts that do not apply. Let us know any issues you wish to discuss.
2. Use various “note” sections to provide any miscellaneous information that you feel we should know.
3. Because we will call and/or email you for information that is needed but missing, please make sure we have a valid phone number and email address.
4. This document may ask for sensitive information like social security numbers. If you do not wish to include social security numbers on this document, then you may just use the last four digits of the social security number and we will call you to get the full number when we need it.
5. We recommend that you gather all tax documents such as receipts, W-2s, 1099s, 1098 forms, driving schedules, your last paycheck stub for 2015, etc. before proceeding.

If you have any questions, please call us at 763-447-3991.

Basic Information: Answer as best you can.

Question	Answer
Are you married?	Yes ☐ No ☐
If married, is your spouse a truck driver?	Yes ☐ No ☐
Did you get divorced in 2015?	Yes ☐ No ☐
Were either you or your spouse a landlord in 2015?	Yes ☐ No ☐
Did either you or your spouse sell stocks or bonds in 2015?	Yes ☐ No ☐
Did either you or your spouse own a business in 2015?	Yes ☐ No ☐
Do you want Trucker Taxes to do your State Return?	Yes ☐ No ☐
Do you want $3.00 to go to the Presidential Election Campaign Fund? (Does not change your refund/amount due)	Yes ☐ No ☐
Do you want your Federal & State Return filed electronically? (it is free of charge)	Yes ☐ No ☐
Do you want Direct Deposit of your refund? (also free of charge) If yes, **send a voided check** along with the other information.	Yes ☐ No ☐
Do you have dependents (children etc.)?	Yes ☐ No ☐
If YES, how many dependents will you claim this year?	______

Profile Section

Taxpayer & Spouse Profile

Title	Taxpayer	Spouse
First Name		
Last Name		
Middle Initial		
Social Security Number		
Date of Birth		
Position or Occupation		
Employer Name		
Type of Trucking Job Check “none” if not applicable	☐ Company Driver ☐ none ☐ Owner-Operator	☐ Company Driver ☐ none ☐ Owner-Operator
Cell Phone		
Home Phone		
Work Phone		
Fax Number		
Preferred Email		
Current Address		

State Residency Information

State	Date Moved In	Date Moved Out	County & School District (required)

Dependent Profiles

If your dependent is between 19 and 23, they must be a full-time student for at least 5 months during the year to qualify for the Earned Income Credit. If your dependent children did not live with you, you must provide a form 8832, Release of Claim or a copy of your divorce decree.

#	First Name	Last Name	SSN	Date of Birth	Relationship	Full-Time Student
1						Yes ☐ No ☐
2						Yes ☐ No ☐
3						Yes ☐ No ☐
4						Yes ☐ No ☐

** If you need more room for dependent information, please use an additional page.

Child and Dependent Care Profiles

If your dependent children received dependent care such as daycare, please provide the information below. Please fill this out for each dependent child that received such care. All information is required.

#	Provider Name	Provider Address	Provider's Tax I.D. # or SSN#	Child's Name / Amount Paid
1				
2				
3				

Divorce Alimony Information

If you pay any alimony, this can adjust your income, but we need to know the recipients social security number.

Alimony recipient's first and last name	
Alimony recipient's social security number (required)	
Amount of alimony paid in 2015 (required)	

Income Section

Please attach all of your income documents- including W2's, 1099B, 1099-INT, 1099-MISC, 1099-DIV, SSA-1099, 1099-C, 1099-G, K-1's, etc. Please place a check mark next to the types of income you (and/or your spouse) have for 2015.

Income

Type of Income	Taxpayer	Spouse
Salary/Wages: Please send all W2 or 1099-MISC forms.		
Interest or Dividend Income: Please send all 1099-INT/1099-DIV forms		
Business Income not report on 1099-MISC: Please include a summary of income and expenses.		
Farm Income: We will contact you for additional information		
Retirement Income: Please provide 1099-R		
Rental Property: Please complete our Rental Property Organizer.		
Scholarships not reported on a 1098-T:		
Other Miscellaneous: We will contact you for additional information		
Unemployment Income:		
State tax refund from 2013?		
Social Security income? Please include all SSA-1099 forms.		

Alimony paid to you?		
Own stock or have ownership in an S-Corp, Trust, or Partnership?		
Have any debt forgiven? Please explain and attach the 1099-C.		
Gambling Winnings? If so, do you have any losses on gambling during the calendar year 2015?		

Adjustments to Income

Enter the amount of the adjustment below.

Type of Adjustment to Income	Taxpayer	Spouse
Health Savings Account Please provide Forms 5498-SA and/or 1099-SA		
Did you spend all HSA distributions on Health Care related expenses?		
Traditional IRA Contributions (not through payroll)		
Student Loan Interest **Please provide form 1098-E**		
Tuition & Fees: **Please provide 1098-T (required)**. Specify the student as the taxpayer, spouse, *or dependent*. List year of degree program.		
Education Savings Accounts: eg. Coverdell education plans, state pre-paid tuition programs, or 529 plans. Specify student's social security number and type of education savings account.		
Did you work for a foreign company that did not provide a W2 or other income statement? (We will contact you for additional information.)		
Did you pay any foreign income tax? (Please send documentation. We will contact you for additional information.)		

Other Important Questions

Did any of your dependents have Investment Income greater than $2,000?
Did you buy and/or sell a house this year? If so, please attach the HUD Settlement Statement.
Did you do any energy improvements to your main home this year? (Windows, Exterior Doors, Insulation, Hot Water Heater, Furnace, etc.) If yes, tell us how much and be sure to have those receipts.
Any foreign bank accounts with more than $10,000 at any point during 2015? Please provide bank name, and average daily balance for 2015, as well as ending balance for December 31, 2015.

Expenses Section

Moving Expenses

Must be job-related AND over 50 miles to qualify

Moves from: ________________________________ to: __________________________________

Distance: ______miles Date of move: _________________ Number of vehicles driven _______

Travel Expenses (truck rental, laborers, storage supplies, etc.): ____________________________

Shipping Expense: _______________________ Lodging Expense: _______________________

Were you reimbursed for this move? Yes ☐ No ☐

This move was related to: Taxpayer's Job ☐ Spouse's Job ☐ Neither ☐

Homeowner Information: Enclose 1098 for both primary & secondary loans

Mortgage Company	
Mortgage Interest Paid	
Mortgage Insurance Premiums (only for loans that closed after Dec. 31, 2006)	
Points Paid	
Property Taxes	
Did you take the first-time homebuyer credit? Yes ☐ No ☐ When? ________________	

Medical Expenses

Item	Taxpayer	Spouse
Health insurance premiums – Not paid through payroll		
Deductibles paid (co-pays)		
Long term care expenses (not covered by insurance)		
Physician/Dentist/Chiropractor		
Contact/glasses/Lasik Surgery		
Prescriptions		
Hospitals and Clinics		
Long term care insurance premiums		
Please indicate who long term care insurance is for the benefit of. (Taxpayer, Spouse, Dependent, Parent, etc.)		
Other - including COBRA [please specify]		

****Affordable Care Act requires us to collect some information regarding your health insurance, and that of your children. Please provide any year end statements from your insurance company.**

How many months of the year did you have Health Care Coverage?		
Did you receive Advance Premium Tax Credit? If so, how much for the year? (You should have 1095-A form, please provide).		
How many months did your dependents have Health Care Coverage in 2015?		

Charitable Contributions:

Type of Donation	Taxpayer	Spouse
Cash or check (you need records which state “No goods or services were received in exchange for this donation” for all donations over $500).		
Donations of Land or Property (please attach appraisal).		
Vehicle Donation (please attach 1099-C form showing Fair Market Value).		
Non Cash Donations (please use one section below to detail each donation organization if your non-cash contributions are over $500 in total).		

Donated to:		Address:		
Item(s)	Fair Market Value at Donation	Date Donated	Date Purchased	Original Value

Donated to:		Address:		
Item(s)	Fair Market Value at Donation	Date Donated	Date Purchased	Original Value

If you made more donations than the above space provides, please include an additional sheet.

Sales Tax Deduction

You have the option of taking the standard deduction plus major purchases (on autos, boats, RVs, aircraft, etc.), or you can provide a total amount for sales tax paid for all purchases during the year. We also have the option of deducting a preset amount based on your income. For taxpayers in states that have income tax, we will deduct either your state income tax or your sales tax; whichever is higher.

Sales tax paid for all items for the year: ______________________________

Sales tax paid on auto, RV, boat, or aircraft: ______________________________

Other Taxes and Miscellaneous Expenses

Real estate taxes paid on 2nd home, vacation home, or land	
Casualty and Theft Losses (must be more than 10% of your AGI)	
Investment Interest earned on Property (Contract for Deed for example)	
Personal Property Taxes (on cars, RV, boat if the tax is based on value)	
Safe deposit box	
Tax prep fees paid in 2015	
Tax prep mailing and shipping	
Did you make any estimated payments for your 2015 taxes to the IRS (or state) during 2015? If yes, enter the amount and date(s). Do not include payments made concerning amounts due from your 2014 return(s).	
Other Information we should know:	

Other Taxes and Miscellaneous Expenses

Real estate taxes paid on 2nd home, vacation home, or land	
State and local income tax (such as NJ Workers Comp) Name of organization: ____________________________	
Investment Interest on Property	
Personal Property Taxes (on cars, RV, boat)	
Safe deposit box	
Tax prep fees paid in 2015	
Tax prep mailing and shipping	
Tax prep books/software	
Vehicle registration fees (based on car's value)	
Educator expenses	

Truck driver work expenses

All items not reimbursed by employer, also specifically used or needed for business, are deductible. Must have some form of proof (i.e. receipts or credit card statements, etc.). You don't need to send them. Receipts for individual travel items that are $75 or less are not required. Save your logbooks to verify your days away from home. Your logbook is a very valuable written record to verify and substantiate your return, please retain each logbook for a minimum of three years.

Truck Purchase or Lease

IMPORTANT: If you are buying, or bought, your truck, please include a copy of your purchase agreement. If you purchased your truck in a previous year, please include the depreciation schedule. If you can't find a depreciation schedule, just send us last year's tax return and we'll calculate the schedule.	
If you are leasing, what is the total of your payments for the year?	

Safety:

Aprons	$
Coveralls	$
Gloves	$
Hard Hats	$
Rain Gear	$
Safety Boots	$
Safety Glasses	$
Thermal Wear	$
Uniforms	$
Other Safety	$

Safety

Adapters/Inverters	$
Air Freshener	$
Alarm Clock	$

Safety Continued:

Antennas	$
Armour All/Windex,Etc.	$
Atlas/Maps	$
Batteries	$
Bedding/Blanket	$
Brooms	$
Buffers	$
Bunk/Mattress	$
Cab Curtains	$
Cabinets	$
Truck Cables	$
TV/VCR	$
Vacuum	$
WD 40	$
Wet Wipes	$

Truck driver work expenses continued

Fees:

Accident/Claims	$
Accounting/Attorney	$
Airline Tickets	$
Association Fees	$
ATM Charges	$
Bank Fees	$
Broker Fees	$
Calculator	$
Clipboard	$
Comcheck Fees	$
Computer	$
Day Planner	$
DOT Physical	$
Faxes/Copies	$
Internet	$
Licensing Fees	$
Logbooks/Covers	$
Notepads	$
Office Furniture	$
Office Supplies	$
Postage and Shipping	$
Professional Fees	$
Receipt Book	$
Safe Deposit Box	$
Subcontract Labor	$
Misc/Other	$

Telephone / Utilities:

Accessories	$
Calling Cards	$
Cell Phone (% for work)	$
Pager	$
Qualcomm	$
Other/Misc.	$

Rent and Leases:

Rental cars	$
Storage Lease/Fees	$
Truck Lease	$
Other Rent or Lease	$

Fuel and Oil:

Additives	$
Fuel	$
Oil	$
Reefer Fuel	$

Insurance and Interest:

Bobtail Insurance	$
Credit Cards	$
Interest on Advances	$
Interest on Business	$
Interest on Truck Loans	$
Other Insurance	$
please describe "Other Insurance"	
Truck Insurance	$
PI & PD Insurance	$
Workman's Comp	$
Other Interest	$
please describe "Other Interest"	

Travel Expenses:

Hotel/Motels	$
Laundry	$
Parking	$
Rental Cars	$
Scale/Weigh Fees	$
Tolls	$
Other	$

Truck driver work expenses continued

Office / Road Expenses:

Brief Case	$
Calendars	$
Chains	$
CB/XM Radio Player	$
CD/DVD Player	$
Cigarette Plug-ins	$
Circuit Testers	$
Cleaning Supplies	$
Coffee Maker	$
Coolers	$
Duct/Electrical Tape	$
Fans	$
First Aid/Disinfectnt	$
Flags/Flares/Signs	$
Flashlights	$
Floor Mats	$
Fly Swatter	$
Fuses	$
Generator	$
Hangers	$
Heaters	$
Ice Scraper	$
Jack Straps	$
Keys	$
Locks & Pallets	$
Microwave	$
Paper Towels	$
Pillows/Sleeping Bags	$
Power Cords	$
Radio Equipment	$
Refrigerators	$
Rope/Tie Downs	$
Rugs	$
Saucepans	$

Office / Road Expenses Continued in next column ➡

Office / Road Expenses Continued:

Scales	$
Seat Covers	$
Sewing Kits	$
Shaving Kits	$
Shift Grips	$
Suitcase/luggage	$
Sunglasses	$
Tarps	$
Thermos	$
Tire Guage	$
Toasters	$
Towels	$
Trash Bags	$

Maintenance and Repairs:

Oil Changes	$
Parts	$
Tires	$
Towing	$
Truck Washes	$
Other Maintenance	$

Taxes:

Ad Valorem Tax	$
Fuel Tax	$
Heavy/Hwy Use Tax	$
Licenses/Plates	$
Permits	$
Registration	$
Other Tax	$

Tools:

Crowbars	$
Screwdrivers	$
Wrenches	$
Other Tools	$

Per Diem Deduction

Number of overnights in 2015 you were away from tax home for trucking travel	

We prefer to use Trucker Per Diem Services to calculate the per diem deduction for over the road truck drivers. In order for us to maximize your return, please provide us with a copy of your driving logs, showing where you slept each night of the year. If you do not have this information immediately available, please contact your dispatcher and ask them to assist you in retrieving the information from their systems.

Per Diem deduction information

Important: We must have your non-taxable per diem amount that you were given for the year. This amount should be on your W2, Box 12, Code "L". It also may be on your Dec. 31 pay stub.		
Non-taxable per diem reimbursement from your employer (W-2, Box 12, Code L)	**Taxpayer**	**Spouse**

Personal Vehicle Expenses

Type and year of vehicle		Do you have evidence to support the deduction?	Yes No
Date first used for business		Is this evidence written?	Yes No
Type of Vehicle: car, van, truck, etc.		Is another vehicle available for personal use?	Yes No
Total Mileage in 2015		Available for personal use in off duty hours?	Yes No
Business Mileage in 2015		Was the vehicle leased?	Yes No
Commuting Mileage in 2015		Was the vehicle used for hire?	Yes No ☐ ☐
Personal Mileage in 2015		Actual Expenses: gas, oil, repairs, ins. Etc.	
Commuting for work is not deductible, but still fill in the mileages above. Non-commuting travel would include union meetings, training, etc., away from hub and is deductible.			

Renters

Residents of: CA, IN, MA, MI, MN, NJ, NY, OH, WI		CA residents only: (Provide Landlord Info. Below)	
Rent Paid		Name	
County		Phone	
Municipality		Address	
School District			

Previous Tax Years

If your previous years' tax returns were not prepared by someone specializing in transportation taxation, you may be able to claim an additional refund for those years. We can amend your previous years' tax returns to capture the deductions that may have been overlooked, resulting in a reduced refund amount.

Would you like us to amend a previous years' tax return? Yes ☐ No ☐

Year and reason for amendment: ______________________________

Electronic Filing

If we file your return electronically (it's free and the fastest, most preferred method), we need you to sign and return to us a completed IRS form 8879. We will mail or email you a completed form 8879, and notify you with a phone call. Once we call you with the final numbers, we need you to either fax, scan and email, upload to your portal, or mail us the completed and signed form. **According to IRS regulations, we cannot file your return until we receive a signed and completed form 8879.**

This year we are pleased to provide a more secure way to deliver and receive your form 8879. There is an additional charge for this service. Please ask your tax preparer for information on this service if you are interested.

State Specific Issues

If you live (or lived) in one of the following states, we will possibly contact you for additional information – CA, CT, DC, DE, FL, GA, HI, ID, IN, MA, MI, MN, MT, NH, NJ, NY, OH, and VT. These states have special credits, deductions, taxes, and etc. that may apply to your return.

Final Checklist

- Copy of all W-2s from all Employers
- Copy of last year's Federal (1040) and state tax return
  (*do not send if we prepared your return last year*)
- Copy of last pay stub (dated 12/31/2015)
- Copy of 12 months of driving schedule (with rest stops and dates)
- Copy of mortgage statement 1098 (Homeowners)
- Voided check for direct deposit
- Payment (after taxes are completed)
- This completed organizer

Once you have sent / uploaded all of your source documents please email or call us to let us know we can start your return.

Additionally, if applicable

Send forms 1099T, 1098T, 1099DIV, 1099B, 1099R, any other 1099's, K-1 statements, copy of Brokerage Statement for all sales, copy of year-end brokerage statement, copy of closing statement if you bought or sold a home.

Payment Options

Payment is completed at the time your return is closed. We accept all major credit cards as well as electronic debits to your bank account.

Promo Code (if you have a promo code, enter it below)

When you finish this organizer

You can mail, email, fax, or upload this document to our secure document storage.

Fax to: 763-447-3991

Mail to: 303 Credit Union Drive, Suite 7, Isanti, MN 55040

Upload to (Preferred method): http://secure.netlinksolution.com. If you have forgotten your user name or need an account setup, please contact us.

Or email this as an attachment to: TruckerTaxesHome@gmail.com

Note: Email is not guaranteed secure during transmission. Please be careful when sending sensitive information over email.

Once you have sent/uploaded all of your source documents please email or call us to let us know we can start your return.

Policies

Trucker Taxes will charge a minimum $5 fee for shipping if you elect to have your tax return sent to you in the mail. Upgraded mailing options are available as well; ask your tax preparer for details.

How would you like to receive your completed return: ☐ Mail ☐ Electronically

When we receive your documents (via mail, fax or portal submission); we will call you to schedule a conference call with your preparer. If you prefer this call to be video conference, please tell our scheduler when we connect. We will not discuss your tax return over voicemail.

Please indicate your preferred contact method: ☐ Email ☐ Phone

Trucker Taxes prepares your return based on information you provide. If you omit information or provide false information to our preparers, we are not responsible for the penalties or fines thereby related. Checking “YES” below indicates you understand and agree to this policy.

Do you agree to the policies described above? Yes ☐ No ☐