Nate Blotter & Associates, LLC

275 North 100 West Logan, Utah 84321 nathan.blotter@lpl.com (435) 753.6500

Estimated Tax Payments

Federal

Amount

Date



Health Savings Acct (HAS)

Contributions Withdrawals

Amount

Tax Organizer

	First	M	Last		Occupation		Birth Date		SS Number		Tuition/Books
Taxpayer						-					
Spouse							-				
Address								•			
Cell Phone	()		Home Phone	()		Ema	nil			
Dependent Information											
Name			SS Number		Birth Date Relation		nship	o College		Tuition	Books
											·
					proprieta de la constitución de la						
Control Control Control											
			-	Child	Care Expe	nses					
Provider's Name Ad					ress			SS# or EIN #		Amount Paid	
				-							
P1	ease provide: W-2	's all 109	5's, all 1099's Rec	'd 109	8 Mortgage I	nt Paid V	oided cl	neck (fo	r direct d	lenosit inform	nation)

New Clients: Provide copy of last year's tax return **IRA Contributions

Trad IRA- Taxpayer

Trad IRA- Spouse Roth IRA- Taxpayer Amount

		Roth IRA- Spouse			·						
Income						Other Items					
Do you have any of the following income?						Have any of the following occurred this year?					
		Yes	No	Amount					Yes	No	
Alimony						Blind- Taxpayer					
Commissions 1099's				Include Tax For	rm	Blind- Spouse					
Debt Forgiveness				Include Tax For	rm	Early Dist. From	Early Dist. From IRA/ Pension Acct				
Disability						Marital Status Change					
Dividends				Include Tax For	rm	Military Move Only					
Gambling							Date				
Installment Sales				Include Tax For	rm:	Mileage					
Interest- Bank, etc.				Include Tax For	rm	Lodging Expe	enses				
IRA Distributions				Include Tax For	rm	New Family Members/ Dependents					
Land Sales						New Mailing Address					
Partnership/ S-Corp/Trust/Estate (K-1)				Include Tax For	rm	Refinanced Home – Need Closing Stmt					
Prizes and Awards						Bought or Sold Home- Need Closing Stmt					
Retirement 1099R				Include Tax For	rm	Purchased new car, light truck, motor home, motorcycle					
Royalties				Include Tax For	rm	Started a New Business					
Social Security				Include SS Stm	nt	Alimony Paid					
Stock Sales (Price & Cost)				Include Tax For	rm	Name		<u> </u>			
Unemployment				Include Tax For	rm	SS#					
Wage W-2's				Include Tax For	rm	Amount					

Medical Expenses*	
*After Taxes & Not From an HSA, MSA or Flex Spe	ending
Insurance Premiums- Other than Medicare (after tax)	
Long Term Care Insurance- Taxpayer (after tax)	
Long Term Care Insurance- Spouse (after tax)	
Prescriptions	
Eyeglasses	
Doctors	
Dentists	
Hospital	
Ambulance	
Medical Mileage (# of Miles)	
Hearing Aids & Batteries	
Insulin	
Other Medical Expenses	
Taxes	na kajad da sa distribuja da na biji disepaga ja ja
Real Estate	
Principle Residence	
Second Residence	
Lot/ Land	
Sales Tax on Major Purchases	2.
Such as Vehicle, Boat or Motor Home	
Interest Expense	ajnus ir sedi vardija epilipis esuseje vyee s
Home Mortgage- Paid to Financial Institutions	1
Home Mortgage- Paid to Individuals	
Name & SS # of Individuals	
Interest Paid on Student Loans- Taxpayer	
Interest Paid on Student Loans- Spouse	
Interest Paid on Motor Home Loan	
Miscellaneous Deductions	
Energy Efficient Home Improvements- Solar Electric Power	

·
es
. Section 1

Other Items that might have income tax consequences							