



2017 TAX PLANNING ORGANIZER

Client Information For Tax Year 2017	
Name:	
Email Address:	
Wages to Date(annualized):	
Federal Withholding to Date:	
2017 Interest Income:	
2017 Dividend Income:	
2017 Capital Gain Income/Loss:	
Rental Income/Expenses:	
Sch C Income/Expenses:	
2017 Mortgage Interest:	
2017 Real Estate Taxes:	
2017 1099R Distributions:	
Charitable Contributions:	
Medical Expenses:	
Total Estimated Tax Payments Paid:	
Any Child Care Expenses:	
Other Important Tax Information: Any changes to dependents? Any changes to filing status? Married or Divorced in 2017?	