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Using the *California FarmLink Tax Organizer* to help file your current or past due taxes

The *Tax Organizer* is designed for farmers and ranchers, and it can be used if you or your spouse also have rental real estate or another business.

This organizer is helpful if:

- You use a paid tax preparer, especially if you are using a new tax preparer or having your taxes prepared for the first time
- You are behind on your taxes and need to organize information for one or more prior years
- You plan to do your own tax returns using online tax preparation software
- You have not kept all of your business income and receipts organized during the year and need to get them all organized now to prepare your tax return

The purpose of the organizer is to make sure that you have all of the tax information you need in one place. If you are using a paid tax preparer this information will ensure that they have all the information they need. This is especially important if they are not specialized in preparing farm or ranch tax returns.

If you are planning to prepare your own tax return using online tax software like H & R Block or Turbo Tax, this organizer will help you to be sure that you are entering all of the information that relates to your farm or ranch. If you answered a question here, but did not find any place to put that same information into the online software program - keep looking, or get help, because you need that information to file a complete and accurate return.

If you are not using a bookkeeper or a bookkeeping system and need to organize all of your receipts and other documents, this organizer will help you to do that.

Section A: General Information.

This section lays the foundation for your tax return. Answer the questions to the best of your ability, they will affect your filing status, the way your tax is calculated, and the deduction you are entitled to.

Section B, Income Not Related to Farming and Ranching.

This section asks questions to help you identify any income that is not related to your agricultural activities.

Section C: Real Estate.

This section helps to organize information about your property holdings and rental activities. If you do not own any real estate you may skip this section.

Section D: Non-Farm Self-Employment Income and Expense.

This section is for any non-farm self-employed business owned by you or your spouse.

Section E: Farm or Ranch Business Income and Expenses.

This is the section for organizing your farm business income and expenses.

Section F: Other Deductions Not Related to Your Business.

This section will help you to organize various deductions unrelated to business activities, including expenses for home mortgage interest, property taxes, charitable contributions, interest paid on student loans, and expenses for dependent care.

Section G: Other Credits.

Credits reduce taxes owed. Answer the questions in the section to ensure you take every credit for which you qualify.

Section H: Saving for Retirement or Education.

This section asks questions that will help you learn if you can save on taxes by saving for retirement.

Section I Payment of Taxes During the Year.

Be sure to review all of your payments to the IRS and any state income tax authorities made during the tax year, as well as any payments made in the following year, such as payments made with a request for extension.