

# Louisiana Tax Organizer

for Tax Year 2016

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Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_

**Please note this organizer addresses only the most common tax credits available from Louisiana. We can provide you with a comprehensive list from the Louisiana Dept of Revenue upon request.**

**School Expense Deduction:** Applies to all children in grades K – 12. A credit is available for children attending public schools, private schools or who are home schooled.

Dependents Name	School	Tuition Paid	School Uniforms	Text Books or Other	Supplies

**If You Retired in 2016:**

What was your date of retirement: Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_

**If You Retired BEFORE 2016:**

What was your date of retirement: Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_ *(Your best guess is OK)*

**Louisiana Citizen’s Insurance Credit:** Please provide a copy of your insurance policy declaration page or provide us with the name and phone number of your homeowner’s insurance agent. This credit also applies to rental property and commercial property. **NOTE: THIS CREDIT HAS BEEN REDUCED TO ONLY 25% OF THE ASSESSMENT PAID IN 2016. MOST TAXPAYERS WILL SEE LITTLE IMPACT ON THEIR RETURN.**

Agent Name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

BECAUSE THIS CREDIT HAS LITTLE VALUE, WE WILL ONLY MAKE 2 ATTEMPTS TO GET YOUR INFORMATION FROM YOUR AGENT. HOWEVER, MOST AGENTS ARE VERY PROMPT IN GETTING US THIS INFORMATION ON THE FIRST REQUEST.

**YES NO**

- Did you or your spouse contribute 30 hours or more in 2016 to an organized athletic program sponsored by receive any local, parish or state government?
  
- Are you or your spouse Volunteer Firemen who completed at least 24 hours of continuing education and are members of LA State Firemen’s Assn or on the personnel roster of the State Fire Marshal’s Volunteer Fireman’s Insurance Program? **Louisiana is now requiring a verification letter from your Fire Dept.**
  
- Did you contribute to a Qualified State Tuition Plan?
  
- Is any member of your family deaf, mentally incapacitated or lost a limb? Please inform us who it is and the circumstances of the condition.
  
- If you have contributed computer or similar technology equipment to a school or other educational institution please let us knows the circumstances and value of the equipment.