



This organizer is designed to assist you in gathering the information required for preparation of your individual income tax returns.

Please complete all applicable sections. Also, please provide details and documentation as requested (documents may be provided electronically).

The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. A negligence penalty may be assessed when income is underreported or when deductions are overstated. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to taxpayers in an envelope clearly marked “IMPORTANT TAX DOCUMENTS ENCLOSED” and should be submitted with this organizer. Include the following, if applicable:

- W-2 (wages)
- 1099-R (retirement)
- 1099-INT (interest)
- 1099-DIV (dividends)
- 1099-B (brokerage sales)
- 1099-MISC (rents, etc.)
- 1099 (any other)
- 1095-A, 1095-B, 1095-C (health insurance)
- 1098-T (education)
- Schedules K-1 (Forms 1065, 1120S, 1041)
- Annual brokerage statements
- 1098 (mortgage interest)
- 8886 (reportable transactions)
- Closing Disclosure (real estate sales/purchases)
- Copies of any tax elections or revocations in effect
- Other information statements

In addition, please provide a copy of your (and your spouse’s, if applicable) driver’s license (front and back). This information may be needed to electronically file your tax return.

The filing deadline for your income tax return is April 15<sup>th</sup>. Your completed tax organizer needs to be received no later than March 15, 2019. Any information received after that date may require an extension to be filed for this return.

If an extension of time is required, any tax due should be paid with that extension. Any taxes not paid by the filing deadline may be subject to late-payment penalties and interest. If you don’t pay a reasonable estimate of your tax liability, your extension may be deemed invalid, subjecting you to late-filing penalties.

Your return will be electronically filed unless otherwise requested or ineligible for e-file. The request to opt out of e-filing may require you to sign a form that will be filed with the taxing authority(ies). We look forward to providing services to you. Should you have questions regarding any items, please do not hesitate to contact us.

If we did not prepare your prior year returns, provide a copy of federal and state returns for the three previous years.

Taxpayer's name \_\_\_\_\_ SSN \_\_\_\_\_ Occupation \_\_\_\_\_

Spouse's name \_\_\_\_\_ SSN \_\_\_\_\_ Occupation \_\_\_\_\_

Home address \_\_\_\_\_

City, town, or post office \_\_\_\_\_ County \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_ School district \_\_\_\_\_

Telephone number \_\_\_\_\_ Telephone number (taxpayer) \_\_\_\_\_ Telephone number (spouse) \_\_\_\_\_

Home \_\_\_\_\_ Office \_\_\_\_\_ Office \_\_\_\_\_

Email (T) \_\_\_\_\_ Fax \_\_\_\_\_ Fax \_\_\_\_\_

Email (S) \_\_\_\_\_ Mobile \_\_\_\_\_ Mobile \_\_\_\_\_

Taxpayer date of birth \_\_\_\_\_ Blind?  Yes  No

Spouse date of birth \_\_\_\_\_ Blind?  Yes  No

► Dependent children who lived with you:

Full name	SSN	Relationship	Birth date

▶ Other dependents:

Full name	SSN	Relationship	Birth date	# months resided in your home	% support furnished by you

Please answer the following questions and submit details for any question answered “yes.” Yes      No

▶ 1) Will the address on your current returns be different from that shown on your prior year returns?  
 If yes, provide the new address and the date moved. \_\_\_\_\_      

▶ 2) Did any births, adoptions, marriages, separations, divorces or deaths occur related to you, your spouse or any of your dependents for 2018?  
 If yes, provide details. \_\_\_\_\_      

▶ 3) Were there any changes in dependents from the prior year? If yes, provide details.  
 \_\_\_\_\_      

▶ 4) Are you entitled to a dependency exemption due to a divorce decree?      

▶ 5) Did any of your dependents have unearned income of \$1,050 or more (\$400 if self-employed)?  
 If yes, do you want us to prepare your child’s tax return? Note that starting in 2018, unearned income can no longer be included on the parent’s tax return.      

▶ 6) Are any dependent children married and filing a joint return with their spouse?      

▶ 7) Did any dependent child 19-23 years of age attend school full time for less than five months during the year?      

▶ 8) Has the IRS, or any state or local taxing agency, notified you of changes to a prior year’s tax return in which you have not already notified us (including a partnership or LLC in which you have an investment)?  
 If yes, provide copies of all notices or correspondence received.      

▶ 9) Did you receive any income from any legal proceedings, cancellation of student loans or other indebtedness during the year? If yes, provide details.      

▶ 10) Did you engage in either a purchase or sale transaction involving cryptocurrency (such as bitcoin)?      

▶ 11) Did you make any gifts during the year directly, indirectly or in trust, exceeding \$15,000 per person?      

▶ 12) Did you make any discounted gifts or gifts of future interest to any person or trust?

Yes No

▶ 13) Did you have any interest in, or signature or other authority over, a bank, securities or other financial account in a foreign country? If the aggregate value of all of your accounts exceeded U.S. \$10,000 at any time during the year, complete the following:

Name and address of financial institution	Account type (bank securities/ other)**	Account number	Maximum value during the year*	Currency	Held separately (S) or jointly (J) or signature authority (SA)	Joint owner's name(s), address, and U.S. taxpayer identification number (if any)

\* Please provide the highest value at any time during the year in the foreign currency.

\*\* Treasury guidance presently (Form 114, *Report of Foreign Bank and Financial Accounts*) defines a foreign financial account as any bank, securities, securities derivatives or other financial instruments account. These accounts generally encompass any accounts in which the assets are held in a commingled fund and the account owner holds an equity interest in the fund (mutual fund). The term also means any savings, demand, checking, deposit, time deposit, debit card or credit card maintained with a financial institution or other person engaged in the business of a financial institution. A financial account also includes a commodity futures or options account, an insurance policy with cash surrender value (whole life), and an annuity policy with cash surrender value.

▶ 14) Did you have an interest in specified foreign financial assets valued at more than \$50,000 on the last day of the tax year or more than \$75,000 at any time during the tax year? Please include assets not previously listed for FinCEN 114 reporting.

Description of asset	Identifying number	Date asset acquired or disposed of during the year	Maximum value of asset during the tax year	Currency/ exchange rate	If asset is stock of a foreign entity, provide name, type and mailing address	If asset is not a stock of a foreign entity, provide name of issuer, type and mailing address

	Yes	No
<p>▶ 15) Did you have foreign income, pay any foreign taxes that are not reflected on an enclosed 1099, or file any foreign information reporting or tax forms? Provide details. _____</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 16) Were you the grantor, transferor or beneficiary of a foreign trust?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 17) Were you a resident of, or did you have income from, more than one state during the year? If so, provide details. You may be required to file tax returns and may also owe taxes in those states. _____</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 18) Do you file use tax returns in any states?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 19) Do you have any unpaid sales/use tax for tax year 2018 (such as from goods you purchased online or from a catalog)?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 20) Do you and/or your spouse want to designate \$3 to the Presidential Election Campaign Fund? Taxpayer      <input type="checkbox"/> Yes      <input type="checkbox"/> No Spouse        <input type="checkbox"/> Yes      <input type="checkbox"/> No</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 21) Do you wish to contribute to any state fund(s)? If yes, indicate amount(s) and which fund(s): _____ _____</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 22) Did you and all members of your household maintain minimum essential health coverage for all months of 2018? Minimum essential coverage includes employer-sponsored health insurance coverage, Medicare, Medicaid or Tricare. a. Enclose documentation received from your employer and/or insurance company, such as Form(s) 1095-B and/or Form(s) 1095-C, even for partial periods of coverage. b. If anyone in the household was not covered for the entire year, provide details that include dates of partial periods of coverage and any other types of health insurance coverage and/or benefits received during the year, such as Indian tribe membership and/or health care sharing ministry membership.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 23) If you or your household did not maintain minimum essential health coverage for the entire year: a. Were you offered coverage (through your or your spouse's plan) that you declined? b. If yes, did the coverage offer minimum value and was it affordable? c. Were you or any member of your household eligible for Medicare or Medicaid, but did not enroll?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>▶ 24) Did you or any member of your family enroll in health insurance coverage through the Health Insurance Marketplace at healthcare.gov under the Affordable Care Act? If yes, enclose Form 1095-A, <i>Health Insurance Marketplace Statement</i>.</p>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
▶ 25) Is more than one tax household sharing the premium tax credit? Examples include adult nondependent children, situations of divorce or a new marriage.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 26) Were either you or your spouse eligible to participate in an employer's health insurance or long-term care plan?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 27) Do you want any overpayment of taxes applied to next year's estimated taxes?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 28) Do you want any federal or state refund deposited directly into your bank account? If yes, enclose a voided check.	<input type="checkbox"/>	<input type="checkbox"/>
a. Do you want any balance due directly withdrawn from this same bank account on the due date?	<input type="checkbox"/>	<input type="checkbox"/>
b. Do you want next year's estimated taxes withdrawn from this same bank account on the due dates?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 29) If you owe federal or state tax upon completion of your return, are you able to pay the balance due?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 30) Do you expect a large fluctuation in your income, deductions or withholding next year? If yes, provide details. _____	<input type="checkbox"/>	<input type="checkbox"/>
▶ 31) Did you receive any distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution (Form 1099-R and proof of rollover)?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 32) If you received an IRA distribution, which you did not roll over, provide details (Form 1099-R).		
a. Did you or your spouse withdraw amounts from your IRA to acquire a personal residence or pay for unreimbursed medical expenses or higher education expenses? If yes, provide details.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 33) Did you convert IRA funds or any other qualified retirement plan funds into a Roth IRA? If yes, provide details (Form 1099-R).	<input type="checkbox"/>	<input type="checkbox"/>
▶ 34) Did you receive any disability payments this year?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 35) Did you have any taxable distributions from an ABLÉ account?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 36) Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 37) Did you sell or purchase a principal residence or other real estate? If yes, provide the settlement sheet (Closing Disclosure) and Form 1099-S.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 38) Did you refinance any existing loans on your home or other real estate you own? If yes, provide the settlement sheet (Closing Disclosure).	<input type="checkbox"/>	<input type="checkbox"/>
▶ 39) Did you collect on any installment contract during the year? Provide details.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 40) During this year, do you have any securities that became worthless or loans that became uncollectible?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 41) Did you receive unemployment compensation? If yes, provide Form 1099-G.	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
▶ 42) Did you receive or pay any alimony during the year? If yes, provide details, including the date of the divorce agreement and the Social Security number of the spouse paying the alimony or whom the alimony was paid.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 43) Did you have any business casualty or theft losses during the year? If yes, provide details.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 44) Did you receive any proceeds (including insurance) on property which was taken from you by destruction, theft, seizure or condemnation?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 45) Did you, or do you plan to, contribute money before April 15, 2019, to a traditional or Roth IRA for the last calendar year? If yes, provide details (note that some states may have earlier due dates).	<input type="checkbox"/>	<input type="checkbox"/>
▶ 46) If you or your spouse have self-employment income, do you want to make a retirement plan contribution?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 47) Did you, or do you plan to, contribute money before April 15, 2019 to a health savings account (HSA) for the last calendar year? If yes, provide details.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 48) Did you receive any distributions from an HSA? If so, provide detail, including Form 1099-SA and Form 5498-SA.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 49) Did you incur expenses as an elementary or secondary educator? If so, how much? The amount deductible is limited to \$250 per taxpayer.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 50) Did you pay real estate taxes on your principal residence or any other real property owned? If so, provide details by property.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 51) Did you purchase gasoline, oil or special fuels for non-highway use vehicles?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 52) Did you purchase an energy-efficient or other new vehicle? If yes, provide the purchase invoice.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 53) Did you pay sales tax on any large purchases, including home improvements? If yes, provide details.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 54) Did you make any energy-efficient improvements (remodel or new construction) to your home?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 55) Did you purchase and place in service any solar water heating, solar electric, fuel cells, small wind energy or geothermal heat pump to any property you own (not just your home)?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 56) Did you incur adoption expenses or adopt a U.S. child that the state has determined to have special needs?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 57) Did you acquire or sell any “qualified small business stock?”	<input type="checkbox"/>	<input type="checkbox"/>
▶ 58) Were you granted, or did you exercise, any stock options? If yes, provide details.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 59) Were you granted any restricted stock? If yes, provide details.	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
▶ 60) Did you pay any household employee over age 18 wages of \$2,000 or more?	<input type="checkbox"/>	<input type="checkbox"/>
a. If yes, provide a copy of form W-2 issued to each household employee.	<input type="checkbox"/>	<input type="checkbox"/>
b. If yes, did you pay total wages of \$1,000 or more in any calendar quarter to all household employees?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 61) Did you surrender any U.S. savings bonds, or did they mature?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 62) Did you use the proceeds from Series EE U.S. savings bonds purchased after 1989 to pay for higher education expenses?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 63) Did you start a business? If yes, provide details.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 64) Did you purchase or convert property you already owned to rental property? If yes, provide the settlement sheet (Closing Disclosure).	<input type="checkbox"/>	<input type="checkbox"/>
▶ 65) Did you acquire or dispose of any interests in partnerships, LLCs, S corporations, estates or trusts this year? If yes, provide the Schedule K-1 that the organization has issued to you.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 66) Do you have records to support travel, meals or gift expenses incurred in your business? The law requires that adequate records be maintained for travel, meals and gift expenses. The documentation should include the amount, time and place, date, business purpose, description of gift(s) (if any), and business relationship of recipient(s). Note that entertainment expenses are no longer deductible.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 67) Did you participate in any bartering transactions (including the use of virtual currency)?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 68) Do you have evidence to substantiate all of your charitable contributions?	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Note:</b> Current tax law requires taxpayers to have the following for all tax deductions of a donation to a charitable contribution of cash, check or any other monetary gift: (1) a bank record (such as a canceled check) or (2) a written communication from the charity that adequately documents the donation. If the donation is \$250 or more, you must have the appropriate written communication from the charity. Written acknowledgment from a donee organization must include (1) the amount of any cash you paid and a description of any property given to the organization, (2) a statement of whether or not the donee organization provides any goods or services related to the contribution, (3) if the donee organization provides any goods or services other than intangible religious benefits, a description and good faith estimate of the value of the goods or services, and (4) if the donee organization provides intangible religious benefits, a statement to that effect. If you make charitable contributions by payroll deductions, you should have a pay stub, Form W-2 or other document furnished by your employer that shows the total amount withheld for payment to a charity and the pledge card that shows the name of the charity. In order to take a deduction for donations of used clothing and household goods, they must be in “good used” condition or better. An exception allows deductions for single items that are appraised at more than \$500, even if they are not in “good condition”.</p>		
▶ 69) Has your will or trust been updated within the last three years? If yes, provide copies.	<input type="checkbox"/>	<input type="checkbox"/>
▶ 70) Can the IRS and state tax authority discuss questions about this return with the preparer?	<input type="checkbox"/>	<input type="checkbox"/>
▶ 71) Did you or any of your dependents receive a Federal IP PIN from the IRS or have you been a victim of identity theft, either in 2018 or in prior years? If you received an IP PIN, provide a copy of the IRS notice.	<input type="checkbox"/>	<input type="checkbox"/>



▶72) Did you or your spouse make any 529 contributions during the year? If yes provide a copy of the year end statement that summarizes the annual contributions.

73) Would you like to receive a hard copy of your tax returns in addition to a PDF?

73) We will use the last four digits of the primary taxpayer's SSN as the password on documents we email you. If you would like us to use a different password please provide the password you would like us to use. \_\_\_\_\_

Estimated tax payments made

	Federal		State (name)	
	Date paid	Amount paid	Date paid	Amount paid
Prior year overpayment applied				
1st quarter				
2nd quarter				
3rd quarter				
4th quarter				

