2019 Tax Organizer Personal and Dependent Information

Personal Information						
Name				SSN	Date	of birth
Taxpayer						
Spouse 20						
Street address, city, state, and ZIP						
Occupation		Daytime phone	Evening	g phone	Cell ph	one
Taxpayer						
Spouse						
Taxpayer email						
Spouse email						
Marital Status at end of 2019	Other informati		_	payer	Spou:	_
Married Married filing separately	Are you blind Are you disa		Ye:		Yes Yes	│ No │ No
Single	Are you a ful	I-time student?	Ye:	s 🗌 No	Yes	🗌 No
Widow(er) If spouse died in 2019 enter the date of death		\$3 to go to the Election Campaign Fund	l? 🗌 Ye	s 🗌 No	Yes	🗌 No
Dependent Information						
First and last name	SSN	Relationship	Months in home	Date of birth	n Disabled	Full- time student
List dependents required to file a return						
Estimates						
Federal Date paid Amount	Date	Resident state paid Amou	int	Ro Date paid	esident city Ar	nount
Overpayment applied rom 2018						
First quarter						
Second quarter						
Third quarter						
Fourth quarter						
Additional payments						
Account Information for Deposits or Withdrawals	i					
	Bank	Bank	Type of	account	Use this ac	count for
Name of bank	routing number	account number	Checking	Savings	Deposits V	Vithdrawal
Appointment Information						
Your 2019 appointment is scheduled for						

2019		
	Client Check	list
Name:	<u>.</u>	SSN:
	sonal Information	
Yes	No Did your marital status change during the year? If "Yes," explain	
	 Can you or your spouse be claimed as a dependent by someon Did your address change during the year? Provide proof of identity to be eligible to e-file your tax return (claimed address change) 	
Depe	endent Information	
	 Did you have any changes in dependents during the year? If "Yes," explain Can another person qualify to claim any of your dependents? Did you have any childcare expenses during the year? Did you have any adoption expenses during the year? 	
	Did you have any children under age 19 or a full-time student u Provide documentation for proof of dependent related credits (s	
Healt	Ith Care Information	
		-
Incor	me, Purchases, Sales, and Debt Information	
	 Did you receive any tips not reported to your employer? Did you receive any disability income during the year? Did you cash any U.S. savings bonds during the year? Did you receive any other income not provided with this organiz If "Yes," explain Did you start a new business or purchase any rental property d Did you sell an existing business, rental property, or other property Did you purchase any business assets or convert any assets to If "Yes," provide the cost of the asset, the date it was placed Did you purchase any gasoline, diesel, or special fuels for non-I Did you sell an principal residence during the year? If "Yes," provide closing documentation for the purchase and Did you abandon a principal residence or a piece of real property Did you refinance your principal home or second home or take If "Yes," provide all escrow, closing, and other pertinent docu Did you rent out your home or use it for business? Did you sell, exchange, or purchase any real estate during the Did you acquire a new or additional interest in a partnership or Did you any debts canceled or forgiven this year? 	uring the year? erty during the year? o business use? in service, and business use percentage. highway business use? ing the year? sale of the home foreclosed on during the year? erty during the year? out a home equity loan during the year? imentation and information. roperty sold in prior years? year? S corporation?
	Did you purchase a new hybrid, alternative motor, or electric m If "Yes," provide the year, make, model, VIN, and date the ve	
Itemi	ized Deduction Information	
	 Did you pay out-of-pocket medical or dental expenses (premiur Did you pay any long-term care premiums for yourself, your special you receive any state or local income tax refunds from prio Did you make any major purchases (vehicle, boat, etc.) during Did you pay any real estate property taxes or personal taxes du Did you pay mortgage interest during the year? 	ouse, or a dependent during the year? r years? the year?

Name:	SSN:
Itemized Deduction Information (continued)	
Yes No Did you make cash donations to charity during the year? Did you make noncash donations to charity (clothes, furniture, etc.) during the year? Did you donate a boat or vehicle during the year? If "Yes," attach Form 1098-C. Did you have gambling winnings or losses during the year? Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safet Did you use your vehicle on the job other than for commuting to work? Did you work out of town at any time during the year? 	ty equipment, etc.)?
Retirement Information	
 Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year? Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) retirement plan during the year? Did you receive any Social Security benefits during the year? 	, myRA, or other qualified
Education Information	
 Did you pay tuition expenses that were required for attending college, university, or vocational school dependent during the year (even if classes were attended in another year)? Did anyone in your household attend a post-secondary school during the year? Did you make a contribution to or receive a distribution from an Education Savings Account or Qual Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year? 	
Miscellaneous Information	
 Did you incur a gain or loss due to damaged or stolen property? If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)? Did you make gifts to any one person in excess of \$15,000 during the year? If "Yes," are you splitting the gift with your spouse? 	S.
 Did you incur moving expenses during the year? Did you make any energy-efficient improvements to your main home during the year? Are you a business owner who paid health insurance premiums for your employees during the year you apply an overpayment of your 2018 taxes to your 2019 estimated taxes? If you have an overpayment of 2019 taxes, do you want the refund applied to your 2020 estimated taxes?Did you make any estimated payments toward your 2019 taxes? Do you want to have any refund or balance due directly deposited or withdrawn? If "Yes," provide a canceled checking or savings slip. 	?Did
Did you receive any notices from the IRS or state taxing authority?	
If "Yes," explain May the IRS discuss your tax return with your preparer? Would you like a copy of your tax return emailed to you instead of receiving a printed copy?	
Foreign Account Information	
 Did you have a financial interest in or signature authority over a financial account or asset located i Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust? Did you have any income from, or pay taxes to, a foreign country? Did you own property in a foreign country? Did you own property in a foreign accounts exceed \$10,000 at any time during the year? 	in a foreign country?
Preparer Notes	
Miscellaneous Notes	

Name:

Checklist

SSN:

Checklist	
	ist is provided to help you gather necessary information for us to prepare your 2019 income tax return. Return Ing with the supporting documentation, to our office and let us know of any significant changes from your 2018
Health Care	e Coverage (for each member of the household)
	Health Insurance Statements (Forms 1095-A, 1095-B, 1095-C)
[]	Any exemption certificates received from HHS giving you an exemption from having health insurance
Other Incon	ne (provide supporting documentation for income received for the following items)
	Sale of assets or property
	Cancellation of debt
[]	Other income
Payments (provide supporting documentation for payments made for the following items)
[]	Educator classroom expenses
[]	Employee business expenses
[]	Contributions to a Health Savings Account
[]	Expenses related to work relocation
[]	Alimony
[]	Student loan interest
[]	Tuition and fees for higher education
[]	Expenses related to child or dependent care
[]	Contributions to a Retirement Savings Account
[]	Medical and dental expenses
[]	Real estate taxes
[]	Other state and local taxes
[]	Mortgage interest
[]	Investment interest
[]	Cash Contributions
[]	Noncash Contributions
[]	Unreimbursed employee expenses
[]	Investment expenses
[]	Gambling losses
[]	Other payments

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Questionnaire SSN: Name: Questionnaire Sharing Economy Yes No Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)? [][] If yes, attach Form 1099-MISC and Form 1099-K. [][] Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)? If yes, attach Form 1099-K or Form W-2.

- Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)? [][] If yes, provide documentation.
- Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)? [][] If yes, attach Form 1099-K.
- Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)? [][] If yes, provide documentation.

Additional Questions

Yes No

- Did you receive income or incur expenses associated with a fantasy sport league? [][] If yes, provide documentation.
- Did you incur gains or losses due to damaged or stolen property? [][]
- [][] Did you incur gains or losses from virtual currencies (e.g., Bitcoin or Ripple)?
- Do you anticipate your income or withholdings to be different for 2019? [][]

Name:

Healthcare Coverage Questionnaire

SSN:

Hea	Ithcar	e Information			
		Member of household for healthcare purposes	Covered the entire year	Covered less than 12 months	No healthcare coverage at all
YES	NO				
		Did anyone other than you or your spouse pay for healthcare coverage for	anyone listed above	?	
		Did you pay for healthcare coverage for anyone not listed above?			
		coverage for any part of the year: e was the policy obtained?			
		Employer / Medicare / Medicaid / Marketplace(Exchange) / Other			
-		t have coverage part or all of the year: ES if the following applies to any member of the household			
		Was your previous insurance policy canceled in 2019?			
		Was coverage offered by your employer or your spouse's employer?			
		Are you a member of a federally recognized Indian tribe?			
		Are you eligible for services through an Indian healthcare provider?			
		Are you a member of a healthcare sharing ministry?			
		Did you live in the United States the entire year?			
		Are you enrolled in TRICARE?			
		Did you apply for CHIP coverage?			
		Do any of the following apply to you? Do NOT indicate which one.			
		Became homeless			
		• Evicted in the past six months, or facing eviction or foreclosure			
		Received a shut-off notice from a utility company			
		Recently experienced domestic violenceRecently experienced the death of a close family member			
		 Recently experienced a fire, flood, or other natural or human-caused of 	isaster		
		 Recently experienced a file, flood, of other natural of numericaused of that resulted in substantial damage to your property Filed for bankruptcy in the last six months 	1949151		
		• Incurred unreimbursed medical expenses in the last 24 months that res	ulted in substantial de	ebt	

Income	
Name: SSN	۷:
Wages & Salaries Provide all copies of Form W-2	
Provide all copies of Form W-2	2019 federal
Employer name	wages
	·
	<u> </u>
	·
Retirement	
Provide all copies of Form 1099-R	
Payer name	2019 distribution
	<u> </u>
	·
Did you take a distribution from an IRA and give it to an organization eligible to receive tax-deductible contributions?	Yes 🗌 No
Form 1099-Misc Income	
Provide all copies of Form 1099-MISC	2019
Payer name	amount
	·

Income		
Name:	SSN:	
Dividend Income		
Provide all copies of Form 1099-DIV & other statements that report dividend income	2019	2019
Account number Payer name	ordinary dividends	qualified dividends
Interest Income		
Provide all copies of Form 1099-INT, Form 1099-OID and other statements that report interest income Account number		2019
Payer name		interest
If any interact income listed above is from a coller financed mortgage, provide the power's ID number and address		
If any interest income listed above is from a seller-financed mortgage, provide the payer's ID number and address		

Sale of Capital	Assets			
Name:			SSN	l:
Sale of Capital Assets (not reported on Form 1099-B)				
Provide all brokerage statements Description of property	Date purchased	Date sold	Sales price	Cost
Installment Sale Income				
Description of property:				
Date acquired Date sold Selling price			2019	Prior years
Mortgages assumed			-	
Cost of property sold			-	
Depreciation allowed				
Commissions and expense of sale				
Gross profit percentage				
Principal payments received				
Property was sold to a related party		•••••		

Schedule C - F	Profit or Loss from Business	
Name:	SSN:	
General Business Information		
Business name	Employer ID number	
Professional product or service		
Business address, city, state, ZIP		
This business started or was acquired during 2019	Yes No Payments of \$600 or more were paid to an individual who not your employee for services provided for this business	no is
This business was disposed of during 2019	Yes No You filed Forms 1099 for the individuals	5
Income		
	2019	2019
Gross receipts or sales	Other income	
Returns & allowances		
Expenses	244	0040
	2019	2019
Advertising	Travel	
Car & truck expenses	Total meals	
Commissions & fees	Utilities	
Contract labor	Wages	
Depletion	Other expenses (list)	
Employee benefit programs		
Insurance (other than health)		
Interest - mortgage		
Interest - other		
Legal & professional services		
Office expenses		
Pension & profit sharing plans		
Rent or lease (vehicles, machinery, & equipment)		
Rent (other business property)		
Repairs & maintenance		
Supplies		
Taxes & licenses		
Cost of Goods Sold		
	2019	2019
Inventory at beginning of year	Materials & supplies	
Purchases	Other costs	
Cost of personal use items	Inventory at end of year	
Cost of labor	There was a change in inventory method	

Expenses Related to Business

Name:	SSN:
Auto Expense	
Name of business vehicle is used for	
Description of vehicle	Date vehicle was placed in service
Yes No This vehicle is available for use during off-duty hours Another vehicle is available for personal use	Yes No There is evidence to support your deduction The evidence is written
Mileage Number of miles the vehicle was driven during 2019	
Business	
Commuting	
Other	
Expenses	
Garage rent	Repairs
Gas	Tires
Insurance	Tolls
Licenses	Lease addback
Oil	Other expenses
Parking fees	
Rental fees	
Interest	
Property tax	·
Business Use of Home	
Name of business home is used for	
The daycare facility was in operation for the entire year	
Expenses Office expenses	Home expenses
Mortgage interest	enter those expenses that
Real estate taxes	pertain exclusively to your once,
Excess mortgage interest	enter those expenses that
Excess real estate taxes	pertain to the entire dwelling.
Insurance	
Rent	
Repairs & maintenance	
Utilities	
Other expenses	

		SSN:
erm rental	Land Royalties	Self-rental Other
🗌 Yes 🗌	No Payments of \$60 not your employ	00 or more were paid to an individual who is vee for services provided for this rental
🗌 Yes 🗌		1099 for the individuals
2019	Rovalties from oil o	2019 as.
		r patent
Rental unit	Rental and homeow	vner
expenses	expenses	
		If this Schedule E is for a a multi-unit dwelling and you
		lived in one unit and rented
		_ out the other units, use the
		"Rental and homeowner expenses" column to show
		expenses that apply to the entire
		property. Use the "Rental unit expenses" column to show
		expenses that pertain ONLY to
		the rental portion of the property.
		If the Schedule E is not for a
		multi-unit property in which you
		 lived in one unit, complete just the "Rental unit expenses"
		column.
		-
		-
		-
		-
		_
	·	_
		_
	· · · · · · · · · · · · · · · · · · ·	-
		-
	erm rental Number of days he unit, enter th Yes Yes 2019 Rental unit	Image: Second state of the second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the percentage you occur. Image: Second state of the unit, enter the unit, enter the percentage you occur. Image: Second state of the unit, enter the unit,

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Name:	SSN:	
Other Income		
Did you receive, sell, exchange, or otherwise acquire any financial interest in any virtual currency at any time dur	ing 2019?	
	2019 Taxpayer	2019 Spouse
Scholarships or grants not reported on Form W-2	. anpayon	opouloo
State income tax refund (attach Forms 1099-G)		
Social Security Benefits (attach Forms 1099-SSA)		
Railroad Retirement Benefits (attach Forms 1099-RRB)		
Alimony received		
Divorce or separation date Amount		
Unemployment compensation (attach Forms 1099-G)		
Unemployment compensation repaid in 2019		
Gambling winnings (attach Forms W2-G)		
Alaska Permanent Fund		
ABLE distributions		
Other income:		
Adjustments	2019	
	Taxpayer	2019 Spouse
Educator expenses (If you are an educator, enter the amount you paid for classroom supplies	Taxpayer	
Contributions made to a Health Savings Account (HSA)		Spouse
Contributions made to a Health Savings Account (HSA)		Spouse
Contributions made to a Health Savings Account (HSA)		Spouse
Contributions made to a Health Savings Account (HSA)		Spouse
Contributions made to a Health Savings Account (HSA)		Spouse
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Contributions made to a Health Savings Account (HSA)		Spouse
Contributions made to a Health Savings Account (HSA)		Spouse
Contributions made to a Health Savings Account (HSA)		Spouse

Name:	SSN:
Medical and Dental Expenses	Charitable Contributions
Health insurance premiums (paid by you)	Donations to charity Cash Noncash Amount
Long-term care premiums (you) • • • • • • • • • • • • • • •	Church
Long-term care premiums (your spouse) • • • • • • • • • •	Boy or Girl Scouts
Long-term care premiums (dependents)	Goodwill
Mileage driven for medical purposes	Red Cross
Medical and dental expenses	Salvation Army
Doctor, dental, etc	United Way
Prescription medicines	Veterans
Insulin	Hospital
Glasses and contacts	University
Hearing aids	Other
Braces	Miles driven for charitable purposes
Medical equipment & supplies	Other Miscellaneous Deductions
Hospital services	Amortizable bond premiums
Laboratory services	Federal estate tax
Nursing services	Gambling losses
Other	Impairment-related work expenses
Taxes Paid	Claim repayments
State and local income taxes	Unrecovered pension investments
Sales tax	Loss from other activities from Schedule K-1
Real estate taxes	Ordinary loss debt instrument
Personal property taxes	Job Expenses & Certain Miscellaneous Deductions
Other taxes (list)	Necessary job expenses you paid that were not reimbursed by your employer
	Safety equipment, tools, & supplies
	Uniforms
Interest Paid	Protective clothing (shoes, hardhats, glasses, etc.)
Mortgage interest paid (attach Form 1098)	Dues to professional organizations
Some of your home mortgage loan was not used to buy, build, or improve your home	Books & subscriptions
Mortgage interest paid to an individual	Other
Paid to:	Tax preparation fees
Name	Other nonpersonal expenses related to taxable income
Address	Safe deposit box fees
City, State, ZIP	Investment expenses not entered elsewhere
SSN or EIN	Other
Investment interest	Qualified mortgage insurance premiums • • • • • •
	Home equity interest · · · · · · · · · · · · · · · · · · ·

	ormation		
Jame:			SSN:
Mortgage Interest Provide all copies of Form 1098			
	Mortgage interest	Mortgage insurance	Real estate
Lender's name	received	premiums	taxes paid
Employee Business Expenses			
 You are a qualified performing artist You are a fee-based state or local government official You are a disabled employee with impairment-related work expenses You are a reservist 	You used		cle for your job during 2019
	NOT reimbursed by your employer	Reim no	bursed by your employer ht included on your W-2
Parking fees, tolls, local transportation			
Do not include meals & entertainment) · · · · · · · · · · · · · · · · · · ·			
Other business expenses			
Dther business expenses			
Casualties and Thefts			
Casualties and Thefts EMA code Property description			
Casualties and Thefts EMA code Property description	Property description		
Casualties and Thefts EMA code Property description Property location	Property description Property location Date property was a	cquired	
Casualties and Thefts EMA code Property description Property location Date property was acquired	Property description Property location Date property was a Date property was d	cquired	
Casualties and Thefts EMA code Property description Property location Date property was acquired Date property was damaged or stolen	Property description Property location Date property was a Date property was d Cost of property dan	cquired amaged or stolen	
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Casualties and Thefts FEMA code Property description Property location Property location Date property was acquired Date property was damaged or stolen Date property damaged or stolen Cost of property damaged or stolen Amount of damage Insurance reimbursement	Property description Property location Date property was a Date property was d Cost of property dan Amount of damage Insurance reimburse	cquired amaged or stolen naged or stolen	