2018 Individual Taxpayer Organizer

Note: If a question is clearly answered by a document you are submitting (driver's license, last year's tax return, W-2, or 1099), feel free to skip that question!

Taxpayer			SSN
First *M.I.* *Last*	Email		IP PIN
Occupation	Date of birth	Are you new to our firm? Yes No	
Address	City	State	Zip
County	Home phone	Work or cell	
Driver's License *No.*	*State*	*Issue Date*	*Exp. Date*

Spouse			SSN
First *M.I.* *Last*	Email		IP PIN
Occupation	Date of birth	Are you new to our firm? Yes No	
Address (If different from Taxpayer)	City	State	Zip
County	Home phone	Work or cell	
Driver's License *No.*	*State*	*Issue Date*	*Exp. Date*

If you moved during 2018, enter your previous address.	Date of move

Marital status at 12/31/18: Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure
Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No
Individuals who are in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.
Have you received any notice from the IRS or state revenue department within the past year? Yes No

Names of dependent children *Child's full name*	*Social Security #*	*IP PIN*	*Date of birth*	*Months lived in home in 2018*	*Relationship to taxpayer*	*College student?*

Did any of the children have income above $1,050 for the year? Yes No Do any of the children have a disability? Yes No
Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2018? Yes No

Other dependents or people who lived with you

Name	*Social Security #*	*IP PIN*	*Date of birth*	*Relationship*	*Income*

If you are due a refund, would you like it directly deposited into your bank account? *Name of bank*

Checking *Savings*	*Routing transit number*	*Account number*

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse — enter "?" if unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?		
	Yes	No	Did you pay or receive alimony in 2018? *Paid/Received* $	*Recipient's SSN*	
	Yes	No	Did you have health insurance for you, your spouse, and all dependents for the entire year?		
	Yes	No	Did you purchase health insurance through a public exchange?		
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?		
	Yes	No	Have you paid alternative minimum tax (AMT) in previous years?		
	Yes	No	Did you pay anyone for domestic services in your home?		
	Yes	No	Did you purchase a new energy-efficient car, truck, or van?		
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
	Yes	No	Are you a member of the military?		
	Yes	No	Were you a citizen of or lived in a foreign country?		
	Yes	No	Do you own or have financial interest in a foreign bank or financial account?		
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? *Designee's name*	*Phone number*	*PIN (any five digits)*
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2018? *(Provide statement for other expenses.)*		
	Yes	No	Were any children attending college? *Year in college* Paid by you: *Tuition* $ Paid by student: *Tuition* $	*Student loan interest* $ *Student loan interest* $	*Books* $ *Books* $
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?		
			Student	*Amount paid* $	
			Name and address of school		
	Yes	No	Did you pay for child or dependent care so you could work or go to school? *(add statement if needed)*		
			Name of provider	*EIN or SSN*	
			Address	*Amount paid* $	
	Yes	No	Do you have any children who earned more than $2,100 of investment income?		
	Yes	No	Did you make any contributions to a 529 plan in 2018?		
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2018?	Traditional IRA	Roth IRA
	Yes	No	Did you roll over any amounts from a retirement account in 2018?		
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?		
	Yes	No	Did you receive any income from an installment sale?		
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2018?		
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2018?		
DEDUCTIONS	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.		
	Yes	No	Did you pay sales taxes on a major purchase in 2018, such as a vehicle, boat, or home?		
	Yes	No	Did you make any charitable contributions in 2018?		
BUSINESS	Yes	No	Did you work from a home office or use your car for business?		
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)		
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?		
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.		
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.		
	Yes	No	Did you refinance a mortgage or take a home equity loan? (Provide closing statement)		
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?		
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.		

State information Full-year resident Part-year resident Nonresident

States of residence during 2018 and dates

School district Do you rent or own your home? Rent Own

Itemized Deductions Worksheet

Medical Expenses. Must exceed 7.5% of income to be a benefit—include cost for dependents—do not include any expenses that were reimbursed by insurance.

Dentists	$	Hospitals	$
Doctors	$	Insurance	$
Equipment	$	Prescriptions	$
Eyeglasses	$	Other	$

Medical miles: ________________ @ 18¢

Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home.

Real estate tax—residence	$
Real estate tax—other	$
Personal property ("car") taxes	$
Property tax refund—received in 2018	$ ( )
Foreign tax paid	$
Other	$
Other	$
Other	$
Balance paid in 2018 from prior year state returns (do not include interest or penalties)	$

Did you keep receipts for sales tax paid during 2018? Yes No
Did you purchase a car, plane, boat, or home in 2018? Yes No
Sales tax paid $ *Purchase paid* $ *Date*

Interest Paid. Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.

Main home	$	Equity loan	$
Second home	$	Equity loan	$
Points	$	Investment interest	$

Charitable Contributions. If over $500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all cash contributions.

Cash	$
Noncash contributions (FMV). Clothing or household items must be in good used condition or better.	$
Did you transfer funds from an IRA directly to a charity? Yes No	$
Charitable mileage	

If you suffered any sudden, unexpected damage or loss of property, or a theft in a federally-declared disaster area, provide details.

Note: Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.

Other Deductions. The following deductions are not subject to a 2% of income limit.

Gambling losses	$	Federal estate tax on IRD	$
Impairment-related expenses	$		

Did you pay a mortgage insurance premium when you purchased your home? *Amount* $ *Date*

Other Deductions or Questions

Adjustments Worksheet

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum $250 each.	$
Health savings account deduction (HSA).	$
Self-employed SEP, SIMPLE, and qualified plans. Some contributions for 2018 may be made in 2019.	$
Self-employed health insurance deduction. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	$
Penalty on early withdrawal of savings.	$
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Some contributions for 2018 may be made in 2019.	$
Student loan interest deduction. Paid for taxpayers and dependents. Income limits apply.	$
Tuition and fees deduction. Qualified tuition and fees if not claiming education credits. Income limits apply.	$

Estimated Tax Payments — Tax Year 2018

Installment	*Date paid*	*Federal*	*Date paid*	*State*
First		$		$
Second		$		$
Third		$		$
Fourth		$		$
Amount applied from 2017 overpayment?		$		$
Total		$		$

Tax Preparation Checklist

Please provide the following documentation:

☐ All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

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☐ Form 1095-A (for health insurance purchased through a public exchange)

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☐ If you are a new client, provide copies of last year's tax returns.

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☐ Copy of the closing statement if you bought or sold real estate.

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☐ Income and deductions categorized on a separate sheet for self-employment/business or rental activities.

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Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer	*Spouse*	*Date*

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.