



This Tax Organizer is designed to help you collect and report the information needed to prepare your 2018 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2018 information in the designated areas on the worksheets. If you need to include additional information, you may use the back of a worksheet or an additional page.

When possible, 2017 information is included for your reference. You do not need to make any 2017 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- ☐ A copy of your 2017 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or pension documentation, such as Form 1099-MISC or Form 1099-R.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer.

2018 TAX ORGANIZER

Taxpayer Information

Last name
 First name
 Middle Initial..... Suffix.....
 Social security number
 Occupation
 Work phone Ext ...
 Cell phone
 E-mail address.....
 Date of birth.....
 Address
 City State..... ZIP Code.....
 Home phone..... Fax number

Spouse Information

Last name.....
 First name
 Middle Initial..... Suffix.....
 Social security number
 Occupation.....
 Work phone..... Ext ...
 Cell phone
 E-mail address.....
 Date of birth
 Apartment number.....
 State..... ZIP Code.....
 Fax number

Dependent Information

| First name Last name | MI Suffix | Social Security Number Relationship | Date of Birth | Months Lived with Taxpayer | Child Care Expense |
|-------------------------|--------------|--|------------------|-------------------------------|-----------------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Child and Dependent Care Provider Expenses

| Name | Address | ID Number | Amount Paid |
|------|---------|-----------|-------------|
| | | | |
| | | | |
| | | | |
| | | | |

Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2018 qualified student loan interest.....

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation

Employer Name

2017 Amount

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc

1099-R Payer Name

2017 Amount

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits

Taxpayer

Spouse

| | | |
|---|-------|-------|
| Social Security Benefits from Form SSA-1099 | _____ | _____ |
| Railroad Retirement Benefits from Form RRB-1099 | _____ | _____ |
| Medicare B premiums withheld | _____ | _____ |
| Medicare C premiums withheld | _____ | _____ |
| Medicare D premiums withheld | _____ | _____ |

Attach Form(s) 1099-MISC – Miscellaneous Income

1099-MISC Payer Name

| |
|-------|
| _____ |
| _____ |
| _____ |
| _____ |

Attach Form(s) 1099-INT – Interest Income

1099-INT Payer Name

2017 Amount

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Attach Form(s) 1099-DIV – Dividend Income

1099-DIV Payer Name

2017 Amount

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Retirement Plan Contributions

Taxpayer

Spouse

| | | |
|---|-------|-------|
| Traditional IRA contributions made for 2018 | _____ | _____ |
| Roth IRA contributions made for 2018 | _____ | _____ |
| SEP, Keogh, Individual 401(k) or SIMPLE Contributions | _____ | _____ |

2018 Deductions

| Medical and Dental Expenses | 2018 Amount | 2017 Amount |
|---|--------------------|--------------------|
| Prescription medications..... | _____ | _____ |
| Health insurance premiums | _____ | _____ |
| Doctors, dentists, etc | _____ | _____ |
| Hospitals, clinics, etc | _____ | _____ |
| Eyeglasses and contact lenses | _____ | _____ |
| Miles driven for medical purposes..... | _____ | _____ |
| Other medical and dental expenses: _____ | _____ | _____ |

| Taxes | 2018 Amount | 2017 Amount |
|--|--------------------|--------------------|
| Real estate taxes paid on principal residence | _____ | _____ |
| Real estate taxes paid on additional homes or land | _____ | _____ |
| Auto license registration fees based on the value of the vehicle | _____ | _____ |
| Other personal property taxes | _____ | _____ |

| Interest Expenses | 2018 Amount | 2017 Amount |
|--|--------------------|--------------------|
| Home mortgage interest paid — Attach Form(s) 1098. Lender's Name _____ | _____ | _____ |
| Points paid on loan to buy, build or improve main home Lender's Name _____ | _____ | _____ |

| Cash/Check/Credit Contributions | 2018 Amount | 2017 Amount |
|--|--------------------|--------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

| Noncash Charitable Contributions |
|---|
| Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property. |

| Miscellaneous Deductions | 2018 Amount | 2017 Amount |
|---|--------------------|--------------------|
| Union and professional dues | _____ | _____ |
| Professional subscriptions, books, supplies | _____ | _____ |
| Uniforms and protective clothing (including cleaning) | _____ | _____ |
| Job search costs | _____ | _____ |
| Taxpayer educator expenses..... | _____ | _____ |
| Spouse educator expenses..... | _____ | _____ |
| Tax return preparation fees | _____ | _____ |
| Safe deposit box rental | _____ | _____ |
| Gambling losses (to the extent of gambling income) | _____ | _____ |
| Other expenses (list): _____ | _____ | _____ |

2018 Questions

| | Yes | No |
|--|--------------------------|--------------------------|
| 1 Did a lender cancel any of your debt in 2018? (Attach any Forms 1099-A or 1099-C)..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2018? If yes , please attach details..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 Did you purchase a motor vehicle or boat during 2018 ? If yes , attach documentation showing sales tax paid. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 Did you purchase a hybrid or electric vehicle in 2018? If yes , enter year, make, model, and date purchased: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 Did you donate a vehicle in 2018? If yes , attach Form 1098C..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 What was the sales tax rate in your locality in 2018 ? % State ID _____ | | |
| 7 Did your marital status change during 2018? If yes , explain: _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 Were you or your spouse permanently and totally disabled in 2018? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 Do you have dependents who must file?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,100?... | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 Did you provide over half the support for any other person during 2018? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 Did you incur adoption expenses during 2018? | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 Did you receive a total 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?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 Did you receive any disability payments in 2018? | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 Did you receive tip income not reported to your employer? | <input type="checkbox"/> | <input type="checkbox"/> |
| 16a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2018 ? If yes , attach closing or escrow statements, 1099-C or 1099-A forms..... | <input type="checkbox"/> | <input type="checkbox"/> |
| b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 Did you incur any casualty or theft losses during 2018 ? | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 Did you incur any non-business bad debts?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 Did you pay any individual for domestic services in 2018 ?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 Did you buy or sell any stocks or bonds in 2018 ? | <input type="checkbox"/> | <input type="checkbox"/> |
| 21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?. | <input type="checkbox"/> | <input type="checkbox"/> |
| 22 Did you incur any moving expenses? If yes , attach details..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 23 Did you receive any income not included in this Tax Organizer?..... If yes , please attach information. | <input type="checkbox"/> | <input type="checkbox"/> |
| 24 Do you expect your income and deductions in 2019 to be the same as 2018 ? | <input type="checkbox"/> | <input type="checkbox"/> |
| If no , attach explanation of changes expected. | | |
| 25a Did you and your dependents have health insurance coverage for the full year? | <input type="checkbox"/> | <input type="checkbox"/> |
| b Did you receive any of the following IRS documents? Forms 1095-A (Health Insurance Marketplace Statement), Form 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage)? If so, please attach..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 26 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____ | | |
| 27 Enter your state of residence..... Taxpayer _____ Spouse _____ | | |

| | Yes | No |
|--|--------------------------|--------------------------|
| Electronic Filing and Direct Deposit of Refund | | |
| If your tax return is eligible for Electronic Filing, would you like to file electronically?..... | <input type="checkbox"/> | <input type="checkbox"/> |
| The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. | | |
| If you receive a refund, would you like direct deposit? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes , please provide a voided check (not a deposit slip) if your bank account information has changed. | | |
| What type of account is this?..... Checking <input type="checkbox"/> Savings <input type="checkbox"/> | | |

| Estimated Tax Paid | | | | | | | |
|--------------------|--------|-------|--------|----|-------|--------|----|
| Federal | | State | | | Local | | |
| Date | Amount | Date | Amount | ID | Date | Amount | ID |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

Additional Information (Enter any additional information here and attach any documents.)