READ THIS FIRST

This tax organizer is designed to help you maximize your deductions and minimize problems in preparing and filing your tax return. Please keep in mind that taxes can be very complicated and even though this organizer will accommodate most taxpayers' needs, if you have a special situation not covered, please list it under "QUESTIONS YOU MAY HAVE."

The **"ALERT FLAGS"** designate certain special conditions as follows:

CHANGE ONLY — Indicates areas that MUST be completed by new clients and only need to be filled in by existing clients when the information has changed.

IRS MATCH — The most important flag of all, denotes areas where the IRS has concentrated their computer matching programs. If the information provided is incorrect, it may trigger a service center audit. Pay particular attention to any special instructions in areas with this flag.

PLEASE PROVIDE THE FOLLOWING

✓ LAST YEAR'S TAX RETURN (only if you are a new client)
✓ ALL WAGE AND INCOME STATEMENTS (W-2s and 1099s*)
If available. They are not required but speed processing of your returns.

TAXPAYER INFORMATION

	Name	Social Security Number	Birth Date
You			
Spouse			

CHANGE ONLY	Occupation	Home Phone	☐ Work Phone ☐ Cell Phone
You			
Spouse			

ADDRESS & STATUS (CHANGE ONLY)

Street Address					
City		State		ZIP	
Email					

Status Changes This Year - Enter Dates

Married		Spouse Deceased		Sold Home	
Separated		Dependent Dec'd.		Sold Property	
Divorced		Moved		Legally Blind	You ☐ Spouse ☐

DEPENDENTS (IRS MATCH) Soc. Sec. numbers are MANDATORY

Name (Include last name if different)	Soc. Sec. #	**	Mo. In Home During Year	Birth Date	If over age of 18: Income	If over age of 18: ✓ If Student

** S = Son, D = Daughter, R = Relative, O = Other

SPECIAL INFORMATION (IRS MATCH)

	You	Spouse
Employer Pension Plan?	☐ Yes	☐ Yes
Traditional IRA, Keogh & SEP Plans:		
Contributions		
Withdrawals *(1099-R)* (1)		
Rollovers (2) or Conversions (3)		
Roth IRA:		
Contributions		
Withdrawals *(1099-R)* (1)		
Rollovers (2) or Conversions (3)		

(1) If under age 59½ show reason
(2) Must be reported even if not taxable unless "transferred"
(3) Conversions (rollovers) from a Traditional IRA or other Qualified Plan to a Roth IRA is generally taxable.

State Tax Refund *(1099-G)*		
Social Security or RR *(SSA-1099/RRB-1099)*		
Alimony Received - *matched with payer*		
Tips Received		
Unemployment Received *(1099-G)*		
Other:		
Alimony paid *(provide information below)*		
Paid to: _____ SS#: _____		
Salaries, Pensions, & Misc. Income	Provide W-2s and 1099s	
Partnership & Trust Income	Provide K-1s	

Gambling Winnings	$	Student Loan Interest	$
Coverdell Contribution	$	Sec. 529 Plan Contribution	$

☐ ✓ If you have been denied earned income credit by the IRS If so, have you been re-certified?..... ☐ Yes ☐ No

☐ ✓ If you bought, sold, or gifted real estate last year. If so, please call in advance to discuss what documents are required.

☐ ✓ If you incurred any adoption expenses this year. If so, enter amount

ESTIMATED TAXES PAID Please provide canceled checks if available.

	Date Due	Date Paid	Federal	State
Applied From Prior Year's Refund				
First Quarter	April			
Second Quarter	June			
Third Quarter	Sept.			
Fourth Quarter	**THIS** Jan.			

INTEREST INCOME (IRS MATCH) IRS computer matches payer and amount. Always use payer name listed on the 1099 even if not the original source.

	Name of Payer (Please provide all forms 1099-INT & 1099-OID)	Banks, Credit Unions, Bonds, etc.	Home State Municipal Bonds (Generally tax free)	Other State Municipal Bonds (Federal tax free)	Direct U.S. Obligations Savings Bonds, T-Bills, etc. (State tax free)
1					
2					
3					
4					
5	Seller Financed Mortgage *(Payer name, address & SS# req'd.)*		Name, Address & SS#:		
6	FORFEITED INTEREST *(early withdrawals)*		FEDERAL WITHHOLDING ON INT & DIV:		
7	Do you have an ownership interest in or signature authority over a foreign financial, bank or securities account? ☐ Yes ☐ No				

DIVIDEND INCOME (IRS MATCH) IRS computer matches payer and amount. Always use payer name listed on the 1099 even if not the original source.

	Name of Payer (Please provide all forms 1099-DIV)	Foreign Taxes Paid	Ordinary Dividends	Qualified Portion*	Capital Gains Dividends	Source U.S. Obligations Savings Bonds, T-Bills, etc. (State tax-free)	Taxable To State Only	Nontaxable State and Federal
1								
2								
3								

*The amount in the "Ordinary" column will include the "Qualified" dividends shown in the "Qualified Portion" column. The portion of ordinary dividends that are qualified receive special tax treatment.

REFUND DIRECT DEPOSIT

Bank Routing Number:

☐☐☐☐☐☐☐☐☐

Account Number:

☐☐☐☐☐☐☐☐☐

☐☐☐☐☐☐☐☐☐

☐☐☐☐☐☐☐☐☐

☐ Checking or ☐ Savings

Note: If you wish to direct deposit in up to three accounts (including IRA accounts), please provide the above information for the additional accounts and specify the refund allocations, on a separate sheet.

QUESTIONS YOU MAY HAVE