2018 Tax Organizer

NEW CLIENT

123 Main St

Lake Zurich, IL 60047

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.

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General Questions

PERSONAL INFORMATION

		Yes	No
1	Did your marital status change during 2018?	☐	☐
	If **yes,** explain .... ________________		
2	Do you want to allow your tax preparer to discuss this year's return with the IRS?	☒	☐
	If **no,** enter another person (if desired) to be allowed to discuss this return with the IRS. **Caution:** Review any transferred information for accuracy.		
	Designee's Name ...... ► ________________		
	Phone Number .... ► ________________ Personal Identification Number (5 digit PIN) ..... ► ________		
3	Do you or your spouse plan to retire in 2019?	☐	☐
4	Were you or your spouse permanently and totally disabled in 2018?	☐	☐
5	Enter date of death for taxpayer or spouse (if during 2018 or 2019): Taxpayer: ________ Spouse: ________		
6	Were you or your spouse a member of the U.S. Armed Forces during 2018?	☐	☐

DEPENDENT INFORMATION

		Yes	No
7 a	Do you have dependents who must file?	☐	☐
b	If **yes,** do you want us to prepare the return(s)?	☐	☐
8 a	Do you have children who are under age 19 or a full time student under age 24 with investment income greater than $2,100?	☐	☐
b	If **yes,** do you want to include your child's income on your return?	☐	☐
9	Are any of your dependents **not** U.S. citizens or residents?	☐	☐
10	Did you provide over half the support for any other person during 2018?	☐	☐
11	Did you incur adoption expenses during 2018?	☐	☐

IRA, PENSION AND EDUCATION SAVINGS PLANS

		Yes	No
12	Did you receive payments from a pension or profit-sharing plan?	☐	☐
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?	☐	☐
14 a	Did you convert all or part of a regular IRA into a Roth IRA?	☐	☐
b	Did you roll over all or part of a qualified plan into a Roth IRA?	☐	☐
15	Did you contribute to a Coverdell Education Savings Account?	☐	☐

ITEMS RELATED TO INCOME/LOSSES

		Yes	No
16	Did you receive any disability payments in 2018?	☐	☐
17	Did you receive tip income **not** reported to your employer?	☐	☐
18 a	Did you buy, sell, refinance, or abandon a principal residence or other real property in 2018? (Attach copies of any escrow statements or Forms 1099.)	☐	☐
b	If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home?	☐	☐
c	Are you planning to purchase a home soon?	☐	☐
19	Did you incur any casualty or theft losses during 2018?	☐	☐
20	Did you incur any non-business bad debts?	☐	☐

PRIOR YEAR TAX RETURNS

		Yes	No
21	Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? If **yes,** enclose agent's report or notice of change.	☐	☐
22	Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?	☐	☐

General Questions (continued)

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

		Yes	No
23	Did you have foreign income or pay any foreign taxes in 2018 ?	☐	☐
24 a	At any time during 2018 , did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	☐	☐
b	Did the aggregate value of all your foreign accounts exceed $10,000 at any time during 2018 ? Report all interest income on Org 11	☐	☐
25	Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust?	☐	☐
26	Did you at any time during 2018 , have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded $50,000 in value at any time during the year?	☐	☐

HEALTH AND LIFE INSURANCE

		Yes	No
27 a	Did you and your dependents have health care coverage for the full year?	☐	☐
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	☐	☐
c	If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemption categories: Indian tribe membership, health sharing ministry membership, religious sect membership, incarceration, exempt non-citizen or economic hardship? If you received an exemption certificate, please attach.	☐	☐
28 a	Did you or your spouse have self-employed health insurance?	☐	☐
b	If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?	☐	☐
29	Did your employer pay premiums on life insurance in excess of $50,000 where the proceeds are payable to beneficiaries named by you?	☐	☐
30	Did you contribute to or receive distributions from a Health Savings Account (HSA)?	☐	☐

MISCELLANEOUS

		Yes	No
31	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2018 ? If **yes,** please attach details	☐	☐
32	Did you start paying mortgage insurance premiums in 2018 ? If **yes,** please attach details	☐	☐
33	Did you purchase a motor vehicle or boat during 2018 ? If **yes,** attach documentation showing sales tax paid.	☐	☐
34	Did you purchase an energy efficient vehicle in 2018 ? If **yes,** enter year, make, model, and date purchased: ______	☐	☐
35	Did you donate a vehicle in 2018 ? If yes, attach Form 1098C	☐	☐
36	What was the sales tax rate in your locality in 2018 ? ______ % State ID .... ____		
37	Did you or your spouse make gifts of over $15,000 to an individual or contribute to a prepaid tuition plan?	☐	☐
38	Did you make gifts to a trust?	☐	☐
39	If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? If **yes,** please attach details.	☐	☐
40	Did you or your spouse participate in a medical savings account in 2018 ? If **yes,** please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)	☐	☐
41	Did you make a loan at an interest rate below market rate?	☐	☐
42	Did you pay any individual for domestic services in 2018 ?	☐	☐
43	Did you pay interest on a student loan for yourself, your spouse, or your dependents?	☐	☐
44	Did you, your spouse, or your dependents attend post-secondary school in 2018 ?	☐	☐
45	Did a lender cancel any of your debt in 2018 ? (Attach any Forms 1099-A or 1099-C)	☐	☐
46	Did you receive any income not included in this Tax Organizer? If **yes,** please attach information.	☐	☐

ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

		Yes	No
47	If your tax return is eligible for Electronic Filing, would you like to file electronically?	☒	☐
48	The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?	☐	☐

Caution: Review transferred information for accuracy.

49 If **yes,** please provide the following information:

a Name of your financial institution ______

b Routing Transit Number (must begin with 01 through 12 or 21 through 32) ______

c Account number ______

d What type of account is this? Checking ☐ Savings ☐

☑ Please attach a **voided** check (not a deposit slip) if your bank account information has changed.