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## 2018 Tax Organizer

Call to schedule your □Appointment:	Day Date	Time I	Preparer	or 🗆	Drop Off □W	leb Portal*
Taxpayer				Spouse		
Name		Name				
NameB	irthday	SSN			Birthday	<u> </u>
Occupation	Health Ins □Y	□N Occupation	on		Health	Ins □Y □N
e-mail		e-mail				
Cell Daytir	me	Cell		Eveni	ing	
Address □New addre			□Yes, Dir	ect Deposit N	ly Refund to	:
		Bank Na	me			□CK □ Sav
	Zip	Rtn #		Acct	#	
Filing Status □Single □MFJ □						
id you and your spouse have health insur here was the policy obtained? □Employo Please include IRS form □1	er □Medicare □Medica 095-A □1095-B □′	aid/AHCCCS □Go	vt/Military □	//arketplace(Exc		
Name (First Last)			#Months		Health Ins	Full Time
(exactly as shown on SS card)	Soc. Sec. No.	Relationship	in Home	Birthdate	All Year	Student
					□Y □N	□Y □N
					□Y □N	□Y □N
					□Y □N	$\Box Y \Box N$
					□Y □N	□Y □N
<u> </u>	TAX DOCUM	IENTS ENCLOS	ED *			•
* To send digital documents, use our	r web portal: login.ato	manager.com/ator	m_1ST	Tax	payer	Spouse
Picture ID (or copy) now required for be	oth Taxpayer & Spous	e by new industry	regulations			
Wages <b>W2</b> □Em	ployment change this y	year				
Pensions and IRAs 1099R						
Social Security 1099SSA						
Interest Income 1099INT						
Dividend Income 1099DIV						
Sales of Capital – 1099B (□enclose b	roker statement) □HUD	1 Sale of Real E	State			
Unemployment and State Tax Refur	nds <b>1099G</b>					
Gambling Winnings W2G (see page 2	2 for gambling losses)					
□Estate, □Trust □S-Corp □Partners	ship □PTP <b>K-1</b>					
□Rents, □Royalties □Prizes, □Self		MISC (see page 3)				
Mortgage Interest 1098 (see page 2)		<u>-</u>				
Education Expense 1098T & -P	roof of Payment	Student Loan □1	098E			
Other 1099s: <b>1099A 1099C 1</b>		1099Q □1099OI	D			
New Clients: Please bring	□ copy of last year's tax	return □Picture ID	□Social Secu	rity Cards for all	Dependents	

# (Standard Ded: \$24,000 Married \$18,000 HOH \$12,000 Single) MEDICAL

# Medical Insurance (not Pre-Tax) Dental/Vision Ins. (not Pre-Tax) LongTerm Care InsuranceTaxpayer LongTerm Care Insurance-Spouse DR DDS Rx Meds X-Ray, Labs, Hospital Eye care & Supplies Hearing Aids & Supplies Medical or Diabetic Supplies Smoking, Weight Loss, Rehab Prog

Assisted Living/Nursing Home

Medical Miles (# miles

(Less Insurance Reimbursements)

### **TAXES**

**Total Medical \$** 

AZ Tax Paid	
State Tax Paid	
Real Estate Tax:	
Auto License (VLT)	
Sales Tax paid on Large Purchases	
□Auto □Boat □Airplane □	
Non-taxable income for addl Sales	
Tax deduction □Adoption □Foster	
□Child Support □VA □	

# ITEMIZED DEDUCTIONS INTEREST

Home Mortgage □1098 □Over \$750K	
2'nd Home/Motor Home □1098	
HELOC □1098 □ Acquisition Debt?	
PMI (expired?)	
Private Mortgage ☐ No 1098	
Name	
SSN	
Address	
Points on Refi. □ HUD-1	
Margin Interest □ 1099	
Other Investment Interest	

### \$ CONTRIBUTIONS \$

House of Worship	
AZ State Charity Credits: * ID#	
Qual Charitable Org    □ AZ321	
Qual Foster Care Org □ AZ352	
Public Schools	
Private Tuition Aid ☐ AZ323 n/a	
Military Family Relief	
(* Please bring donation receipts for	AZ Credits)

# (\* Please bring donation receipts for AZ Credits)

NUN-CASH CONTRIBUTIONS ""			
1)			
2)			
Total **			
Charity Miles (# Miles)			

( \*\* If over \$500 additional detail required)

### **ESTIMATED TAXES PAID**

Due	Mailed	IRS	Ariz.	
Applied fr	om last yr			
April 15				
June 15				
Sept 15				
Jan 15				

# Reserved for Possible State Use Only: MISCELLANEOUS

Investment Acct Fees	
Investment Publications	
Casualty □ Fed Disaster Area?	
Gambling Losses (<=winnings)	
Tax Prep	
Safety Deposit Box	
Moving Exp □ Active Duty Military	

### **EMPLOYEE BUSINESS EXPENSE**

	J	
	Taxpayer	Spouse
Educator Expenses		
Job Search		
Union/Profess. Dues		
Uniforms		
Tools & Equip		
Prof. Publications		
Training/Education		
Travel		
Bus Meal s		
Auto Miles: Total		
Business		
Commuting		

## SELF EMPLOYMENT INCOME

### **RENTALS / ROYALTIES**

Business Name  EIN (if available)  Owner (□Taxpayer □Spouse) □LLC □T □S □ Home Office? Sq FtOfficeHome □Y □ Gross Receipts or Sales □1099MISC \$ Purchases of Inventory  EOY Ending Inventory  Advertising  Auto - Yr: Make: # Miles Gas, Oil Mtce \$ Total: Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA) Insurance (not health) Insurance (SE Health) Interest (not auto)  Legal, Professional, Tax Prep  Office Expense Rent - Equipment Rent - Building Repairs & Maintenance Supplies  Taxes & License  Travel Meals & Entertainment Utilities & Telephone  Wages Payroll Taxes	ount \$ Amount	Pro
Owner (¬Taxpayer ¬Spouse) ¬LLC ¬T¬S¬ Home Office? Sq FtOfficeHome ¬Y¬ Gross Receipts or Sales ¬1099MISC \$ Purchases of Inventory  EOY Ending Inventory  Advertising  Auto - Yr: Make: # Miles  Gas, Oil Mtce \$ Total: Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued ¬Y¬N¬NA)  Insurance (not health) Insurance (SE Health) Interest (not auto)  Legal, Professional, Tax Prep  Office Expense  Rent - Equipment  Rent - Building  Repairs & Maintenance  Supplies  Taxes & License  Travel  Meals & Entertainment  Utilities & Telephone  Wages		Gross Rent
Home Office? Sq FtOfficeHome		Advertising
Gross Receipts or Sales		Auto (# mile
Purchases of Inventory  EOY Ending Inventory  Advertising  Auto - Yr: Make: # Miles  Gas, Oil Mtce \$ Total: Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA) Insurance (not health) Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep  Office Expense Rent — Equipment Rent — Building Repairs & Maintenance Supplies  Taxes & License  Travel Meals & Entertainment Utilities & Telephone Wages		Cleaning
Purchases of Inventory  EOY Ending Inventory  Advertising  Auto - Yr: Make: # Miles  Gas, Oil Mtce \$ Total: Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA) Insurance (not health) Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep  Office Expense Rent — Equipment Rent — Building Repairs & Maintenance Supplies  Taxes & License  Travel Meals & Entertainment Utilities & Telephone Wages	\$	Commission
Advertising Auto - Yr: Make: # Miles Gas, Oil Mtce \$ Total: Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA) Insurance (not health) Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep Office Expense Rent - Equipment Rent - Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Insurance -
Auto - Yr: Make: # Miles Gas, Oil Mtce \$ Total: Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA) Insurance (not health) Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep Office Expense Rent - Equipment Rent - Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Insurance -
Gas, Oil Mtce \$ Total: Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA) Insurance (not health) Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep Office Expense Rent – Equipment Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Legal, Profe
Interest Pd \$ Business: License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA) Insurance (not health) Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep Office Expense Rent – Equipment Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages	es: # Miles:	Manageme
License/Reg \$ Commuting:  Contract Labor(1099Misc Issued □Y □N □NA)  Insurance (not health)  Insurance (SE Health)  Interest (not auto)  Legal, Professional, Tax Prep  Office Expense  Rent – Equipment  Rent – Building  Repairs & Maintenance  Supplies  Taxes & License  Travel  Meals & Entertainment  Utilities & Telephone  Wages		_ Mortgage Ir
Contract Labor(1099Misc Issued 🗆 Y 🗆 N 🗆 NA)  Insurance (not health)  Insurance (SE Health)  Interest (not auto)  Legal, Professional, Tax Prep  Office Expense  Rent – Equipment  Rent – Building  Repairs & Maintenance  Supplies  Taxes & License  Travel  Meals & Entertainment  Utilities & Telephone  Wages		_ Mortgage Ir
Insurance (not health) Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep Office Expense Rent – Equipment Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Other Intere
Insurance (SE Health) Interest (not auto) Legal, Professional, Tax Prep Office Expense Rent – Equipment Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Manageme
Interest (not auto)  Legal, Professional, Tax Prep  Office Expense  Rent – Equipment  Rent – Building  Repairs & Maintenance  Supplies  Taxes & License  Travel  Meals & Entertainment  Utilities & Telephone  Wages		Repairs / M
Legal, Professional, Tax Prep Office Expense Rent – Equipment Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Supplies
Office Expense Rent – Equipment Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Taxes –Rea
Rent – Equipment Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Taxes - Oth
Rent – Building Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Travel
Repairs & Maintenance Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Utilities & T
Supplies Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		HOA Fees
Taxes & License Travel Meals & Entertainment Utilities & Telephone Wages		Bank / Colle
Travel  Meals & Entertainment  Utilities & Telephone  Wages		
Meals & Entertainment Utilities & Telephone Wages		
Utilities & Telephone Wages		
Wages		1099Misc Is
		Improveme
Payroll Taxes		If new/sold-
Business Assets purchased/sold this year? □ list attact	ched ☐ list attached	

INEI/I/A	LOINDIALI		,		
Property Description:	1	2	3		
Gross Rents /Royalties					
Advertising					
Auto (# miles)					
Cleaning					
Commissions					
Insurance – Real Estate					
Insurance – Mortgage (PMI)					
Legal, Professional, Tax Prep					
Management Fees					
Mortgage Interest □1098 □no 1098					
Mortgage Interest □1098 □no 1098					
Other Interest					
Management Fees					
Repairs / Maintenance					
Supplies					
Taxes –Real Estate					
Taxes - Other					
Travel					
Utilities & Telephone					
HOA Fees					
Bank / Collection Fees					
1099Misc Issued?	□Y □N □NA				
Improvements made this year?	□ list attached	□ list attached	□ list attached		
If new/sold-provide HUD-1 stmt.	□ purch. □sale	□ purch. □sale	□ purch. □sale		
NOTES					

### GAINS & LOSSES FROM SALES OF REAL ESTATE, PERSONAL PROPERTY & COLLECTIBLES

IRS Requires □Form 1099B Broker Statements for all sales of Stocks, Bonds, and Mutual Funds

Description	Buy Date	Sell Date	Sale Price	Cost

Provide □1099S and HUD-1 closing documents (both □ purchase and □sale) for any Real Estate transactions
OTHER INFORMATION, INCOME, ADJUSTMENTS or CREDITS

OTHER INFORMATION, INCOME, ADJUSTMENTS or CREDITS					
		Taxpayer	Spouse		
Did anyone else other than your spouse or dependents	□Y □N	□Y □N			
Did you have a Foster Child    Caseworker Placement Letter (required)		□Y □N	□Y □N		
Did you have a Foreign Financial Account or interest in		□Y □N	□Y □N		
Did you receive any notices from the □IRS or □AZ DO	R □Copy Attached	□Y □N	□Y □N		
Did you foreclose or abandon any Real Estate □Primary Res □Other		□Y □N	□Y □N		
Did you have any debt cancelled or forgiven this year □1099C		□Y □N	□Y □N		
Did you gift more than \$15,000 to any one individual		□Y □N	□Y □N		
Did you install solar or other energy efficient home improvements		□Y □N	□Y □N		
Did you have any Crypto-Currency Transactions □Exchange Spreadsheet		□Y □N	□Y □N		
Sharing Economy Income □Airbnb □Lyft □Uber □	Other	□Y □N	□Y □N		
Tips not Reported to Employer		\$	\$		
Taxable Grants, Scholarships or Fellowships		\$	\$		
Jury Duty payments received		\$	\$		
Alimony Received (Alimony does not include child support)		\$	\$		
Alimony Paid to: NameSSN		\$	\$		
Address		,	,		
IRA Deposit □ done by 12/31 □ will do by 4/1		\$	\$		
Roth IRA Deposit □ done by 12/31 □ will do by 4/15 □ advise me		\$	\$		
SEP Deposit □ done by 12/31 □ will do by 4/1		\$	\$		
529 Education Savings Plan Contributions (Now deductible for AZ up to \$4,000)		\$	\$		
Health Savings Account □Contributions □Distributions					
College Tuition & Fees Paid <b>1098T</b> Proof of Payment (required)		\$	\$		
If paid by Student Loan, who's responsible to repay □Parent □Student					
Claimed American Opportunity or Hope Credits before □Y □N # years:					
Student Loan Interest Paid □1098E		\$	\$		
□Adoption Credit □Special Needs (□Adoption Order □Subsidy Agreement)					
DAYCARE EXPENSES					
Provider	Provider				

Provider		Provider	
SSN/EIN	Amount Pd \$	SSN/EIN	Amount Pd \$
Address	Zip	Address	Zip
For Dependent(s) _	· · · · · · · · · · · · · · · · · · ·	For Dependent(s)	·

### OTHER ITEMS or NEXT YEAR CHANGES YOU'D LIKE TO DISCUSS