

## 2019 Income Tax Organizer

---

### Taxpayer

Name: _____	Date of Birth: _____
Occupation: _____	Social Security #: _____
E-Mail Address: _____	Primary Phone #: _____

### Spouse

Name: _____	Date of Birth: _____
Occupation: _____	Social Security #: _____
E-Mail Address: _____	Primary Phone #: _____

### Home Address

Street Address: \_\_\_\_\_  
 Street Address Line 2: \_\_\_\_\_  
 Zip Code: \_\_\_\_\_  
 City, State: \_\_\_\_\_

### Mailing Address

Street Address: \_\_\_\_\_  
 Street Address Line 2: \_\_\_\_\_  
 Zip Code: \_\_\_\_\_  
 City, State: \_\_\_\_\_

### Dependents:

If different from last year's return, please give the following information for each dependent. Also, if your dependent filed a tax return, please attach a copy of their return. *(Note: you must have a SSN for each dependent.)*

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Relationship: \_\_\_\_\_ Income<sup>2</sup>: \_\_\_\_\_ # of Months in home during 2019: \_\_\_\_\_

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Relationship: \_\_\_\_\_ Income<sup>2</sup>: \_\_\_\_\_ # of Months in home during 2019: \_\_\_\_\_

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Relationship: \_\_\_\_\_ Income<sup>2</sup>: \_\_\_\_\_ # of Months in home during 2019: \_\_\_\_\_

Indicate source of income (wages, interest, etc.) Attach supporting documents (Forms W-2, 1099, etc.) If you did **NOT** provide more than 50% of each dependent's support, please give details.

### Refunds:

If you get a tax refund, would you like Direct Deposit from the IRS? Yes: \_\_\_ No: \_\_\_  
 If yes: Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_ Checking \_\_\_ Savings \_\_\_

**PLEASE CHECK THE BOXES AND FILL OUT THE INFORMATION THAT IS RELEVANT TO YOUR SITUATION. ATTACH SUPPORTING DOCUMENTS AS REQUESTED AND COPIES OF ALL IRS CORRESPONDENCE. NEW CLIENTS SHOULD PROVIDE COPIES OF THE LAST 3 YEARS TAX RETURNS SO WE MAY BETTER UNDERSTAND YOUR TAX SITUATION. IF YOU OWN A TRADE OR BUSINESS, PLEASE FILL OUT THE SCHEDULE C TAX ORGANIZER.**

## A. INCOME

1.)  **Did you receive wages?** Number of Forms W-2 received: \_\_\_\_\_

2.)  **Did you receive interest or dividends?** Attach Forms 1099-INT or 1099-DIV.

3.)  **Did you receive income from self-employment?** (For example, as an independent contractor or from running your own business). Attach any Forms **1099-MISC** you received and fill out the Schedule C tax organizer.

4.)  **Did you sell stock or other securities?** Attach broker's statements.

5.)  **Did you sell land, property, or other assets held for investment?** Attach sales documents, including HUD-1s, 1099-S, etc.

6.)  **Did you receive retirement income?** (For example, distributions from 401Ks, IRAs, or pensions). Attach any 1099-Rs.

7.)  **Did you rollover or distribute any retirement funds?** (For example, from 401Ks or IRAs).

8.)  **Did you receive rental income?** Attach statement(s) of rental income and expense and any Forms 1099-MISC.

9.)  **Did you receive royalties?** Attach any Forms 1099-MISC.

10.)  **Did you received any Forms K-1 from partnerships, S-corporations, trusts, or estates?** Attach Forms K-1.

11.)  **Did you have income or loss from a farm or ranch?** Attach statement(s) of income and expense.

12.)  **Did you receive unemployment compensation?**

13.)  **Did you receive Social Security benefits?** Attach Form(s) SSA-1099.

14.)  **Did you have any loans between you and a business you own?**

15.)  **Did you receive income in the form of cryptocurrencies?** (e.g. Bitcoin, Litecoin, Ethereum, etc.)

16.)  **Did you receive income from foreign sources?**

17.)  **Did you receive cash or other property you believe is non-taxable, such as:**

- a.  Interest on municipal bonds?
- b.  Cash for services, products, or rentals?
- c.  Gifts or inheritances?
- d.  Property received in a like-kind exchange (for example, Section 1031 exchange)
- e.  Property received in a barter transaction?
- f.  Other? Please describe:

18.) Please list any other income you received, not listed above:

---

---

---

---

**B. GENERAL EXPENSES**

19.) \_\_\_ Did you make contributions to a Medical or Health Savings Account? \_\_\_ MSA \_\_\_ HSA.  
Were distributions used only for medical expenses?: Yes: \_\_\_ No: \_\_\_

20.) \_\_\_ Did you make contributions to a retirement account(s)? (For example, 401K, IRA, SEP, etc.)

21.) \_\_\_ Did you give gifts in excess of \$15,000 to any one person?

22.) \_\_\_ Did you have any medical or dental expenses that were not reimbursed by insurance?

23.) \_\_\_ Did you pay state or local taxes? (e.g. property tax, boat or RV tax, etc.)? (Note: this does *not* include Texas car registrations.)

24.) \_\_\_ Did you pay mortgage interest on your primary residence and/or second home or RV (including home equity loan)? Attach Form 1098.

25.) \_\_\_ Did you make cash donations to a charitable organization?

26.) \_\_\_ Did you make non-cash donations to a charitable organization?

27.) \_\_\_ Did you have any casualty or theft losses in federally declared disaster areas?

28.) \_\_\_ Did you have any non-business bad debts?

29.) \_\_\_ Did you pay for dependent care services so you could be employed or a full-time student?

30.) \_\_\_ Did you pay or receive alimony?

31.) \_\_\_ Did you make any estimated tax payments? Give dates and amounts:

Date: \_\_\_\_\_ Amount: \_\_\_\_\_  
Date: \_\_\_\_\_ Amount: \_\_\_\_\_

Date: \_\_\_\_\_ Amount: \_\_\_\_\_  
Date: \_\_\_\_\_ Amount: \_\_\_\_\_

**D. EDUCATION:**

32.) \_\_\_ Did you or your dependents have costs for higher education? (For example, college, continuing education, etc.) Attach Form 1098-T.

33.) \_\_\_ Did you or your dependents pay student loan interest? Attach Form 1098-E.

34.) \_\_\_ Did you or your dependents receive any scholarships or grants?

35.) \_\_\_ Do you or your spouse or dependents have a Coverdell ESA or Section 529 plan?

## E. OTHER:

36.) \_\_\_ Did you sell your home in 2019? Attach settlement statements (HUD-1s) for the sale, and for when you originally bought the home.

37.) \_\_\_ Did you purchase your home in 2018? Attach settlement statement (HUD-1).

38.) \_\_\_ Do you have any foreign bank accounts of \$10,000 or more?

39.) \_\_\_ Did you make any charitable contributions paid directly from your IRA?

40.) \_\_\_ Did you pay sales tax on large purchases (car, boat, RV, etc.)? Amount of sales tax paid: \$\_\_\_\_\_

41.) \_\_\_ Do you and your spouse both have a written will? Date last reviewed: \_\_\_\_\_

42.) \_\_\_ Please explain to us how you are planning for retirement. \_\_\_\_\_

43.) \_\_\_ Have you considered non-qualified plan options for retirement? Please explain.

44.) \_\_\_ Do you have a plan for gifting your wealth to reduce estate taxes? Please explain.

## Privacy Policy

CPAs are bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

### Types of Non-Public Personal Information We Collect

We collect non-public personal information about you that is provided to us by you or obtained by us with your authorization.

### Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of the information being shared.

### Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your non-public personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.