

2019**1040****US****Tax Organizer**

Please enter all pertinent 2019 information. If you have attached a government form for an item, check the box and do not enter a 2019 amount.

WAGES, SALARIES AND TIPS

Employer name:

		2019 Amount	2018 Amount
<input type="checkbox"/>		Attach Forms W-2	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

INTEREST INCOME

Payer name:

<input type="checkbox"/>		Attach Forms 1099-INT	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

DIVIDEND INCOME

Payer name:

<input type="checkbox"/>		Attach Forms 1099-DIV	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

<input type="checkbox"/>		Attach Forms 1099-R & W-2G	
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
	Winnings not reported on W-2G.....		
	Total gambling losses.....		

OTHER GOVERNMENT FORMS - INCOME

<input type="checkbox"/>	Form 1099-B - Sales of stock (also include transaction history).....	Attach Forms 1099
<input type="checkbox"/>	Form 1099-MISC - Miscellaneous income.....	
<input type="checkbox"/>	Form 1099-K - Merchant card and third party network payments.....	
<input type="checkbox"/>	Form 1099-S - Sales of real estate (also include closing statements)	

<input type="checkbox"/>	Form 1099-G - State tax refunds.....	Attach Forms 1099
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Taxpayer:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....	Attach Forms 1099
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....	
<input type="checkbox"/>	Form 1099-Q (529 Plan).....	
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts).....	

Spouse:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....	Attach Forms 1099
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....	
<input type="checkbox"/>	Form 1099-Q (529 Plan).....	
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts).....	

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MISCELLANEOUS INCOME

Taxpayer: Alimony received.....

Spouse: Alimony received

Other:

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: Traditional IRA contributions (1=maximum).....

Roth IRA contributions (1=maximum)

Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum).....

Spouse: Traditional IRA contributions (1=maximum).....

Roth IRA contributions (1=maximum)

Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum).....

2019 Amount	2018 Amount

OTHER GOVERNMENT FORMS - DEDUCTIONS

☐ Form 1098-E - Student loan interest

☐ Form 1098-T - Tuition and related expenses.....

Attach Forms 1098**AFFORDABLE CARE ACT**

☐ Form 1095-A - Health Insurance Marketplace Statement.....

☐ Form 1095-B - Health Coverage.....

☐ Form 1095-C - Employer-Provided Health Insurance Offer and Coverage.....

Attach Forms 1095**ADJUSTMENTS TO INCOME**

Taxpayer:

Self-employed health insurance premiums.....

Educator expenses.....

Other adjustments to income:

Alimony paid - Recipient name & SSN

Spouse:

Self-employed health insurance premiums.....

Educator expenses.....

Other adjustments to income:

Alimony paid - Recipient name & SSN

MEDICAL AND DENTAL EXPENSES

Prescription medicines and drugs.....

Doctors, dentists and nurses

Hospitals and nursing homes.....

Insurance premiums.....

Long-term care premiums - taxpayer.....

Long-term care premiums - spouse.....

Insurance reimbursement.....

Out-of-pocket lodging and transportation expenses

Number of medical miles.....

Other:

TAXES PAID

State income taxes - 1/19 payment on 2018 state estimate.....

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State income taxes - paid with 2018 state extension

State income taxes - paid with 2018 state return

State income taxes - paid for prior years and/or to other states

City/local income taxes - 1/19 payment on 2018 city/local estimate

City/local income taxes - paid with 2018 city/local extension

City/local income taxes - paid with 2018 city/local return

State and local sales taxes (except autos and special items)

Use taxes paid on 2019 purchases

Use taxes paid on 2018 state return

Sales tax on autos not included above

Sales taxes paid on boats, aircraft, and other special items

Real estate taxes - principal residence

Real estate taxes - property held for investment

Foreign income taxes

☐ Personal property taxes (including automobile fees in some states)

2019 Amount

2018 Amount

Attach Tax Notice

Home mortgage interest and points paid:

Attach Forms 1098

Home mortgage interest not on Form 1098 (include name, SSN, & address of payee):

Points not reported on Form 1098:

Mortgage insurance premiums on post 12/31/06 contracts.....

Investment interest (interest on margin accounts):

Passive interest.....

NOTE: No deduction is allowed for cash or check contributions unless the donor maintains a bank record, or a written communication from the donee, showing the name of the organization, contribution date(s), and contribution amount(s).

Volunteer expenses (out-of-pocket).....

Number of charitable miles.....

NOTE: No deduction is allowed for contributions of clothing and household items that are not in good used condition or better, in addition, a deduction for any item with minimal monetary value may be denied.

Union and professional dues

Tax return preparation fee

Safe deposit box rental

Investment expenses

Estate tax, section 691(c)

Unreimbursed employee expenses:

Other: _____

2019**1040****US****Miscellaneous Questions**

If any of the following items pertain to you or your spouse for 2019, please check the appropriate box and provide additional information if necessary.

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	Did your marital status change during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Did your address change during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Could you be claimed as a dependent on another person's tax return?
<input type="checkbox"/>	<input type="checkbox"/>	Were there any changes in dependents?
<input type="checkbox"/>	<input type="checkbox"/>	Did you and your dependents have health care coverage for the full-year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive an IRS document 1095-A (Health Insurance Marketplace Statement)? If so, please attach.
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive unreported tip income of \$20 or more in any month?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any disability income?
<input type="checkbox"/>	<input type="checkbox"/>	Did you buy or sell any stocks, bonds or other investment property?
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
<input type="checkbox"/>	<input type="checkbox"/>	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>	Did you transfer or rollover any amount from one retirement plan to another?
<input type="checkbox"/>	<input type="checkbox"/>	Did you convert part or all of your traditional/SEP/SIMPLE IRA to a Roth IRA?
<input type="checkbox"/>	<input type="checkbox"/>	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?
<input type="checkbox"/>	<input type="checkbox"/>	Did you incur a loss because of damaged or stolen property?
<input type="checkbox"/>	<input type="checkbox"/>	Did you use your car on the job (other than to and from work)?
<input type="checkbox"/>	<input type="checkbox"/>	May the IRS discuss your tax return with your preparer?
<input type="checkbox"/>	<input type="checkbox"/>	Was your home rented out or used for business?
<input type="checkbox"/>	<input type="checkbox"/>	Were you notified or audited by either the IRS or the State taxing agency?