2018 TAX ORGANIZER

PLEASE COMPLETE AND DELIVER THIS WITH YOUR 2018 TAX DOCUMENTS

*** PLEASE INDICATE BELOW ALL NAMES AS THEY CURRENTLY APPEAR ON U.S. ISSUED SOCIAL SECURITY CARD*

Taxpayer:	Occup:	SSN:	DOB:
Spouse:	Occup:	SSN:	DOB:

Address:	Primary Contact Number:
	Secondary Contact Number:
E-mail Address:	Spouse's or Alternative E-mail:

Dependent Information (use additional sheets if more than 4 dependents):

Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:
Name & Relationship:	SSN:	DOB:

TAX RETURNS FOR 2018 WILL BE E-FILED. YOU MAY CHOOSE TO HAVE ANY REFUND DIRECT DEPOSITED INTO YOUR CHECKING OR SAVINGS ACCOUNT OR MAILED TO YOU - INDICATE OPTION 1 OR 2:

☐ **OPTION ONE:** HERE IS MY BANK NAME, ROUTING NUMBER & ACCOUNT NUMBER - PLEASE ALLOW REFUNDS AND PAYMENTS TO TRANSACT DIRECTLY BETWEEN MY ACCOUNT AND FEDERAL & STATE AUTHORITIES. IF MY TAX RETURN CANNOT BE TRANSMITTED ELECTRONICALLY, I WILL BE RESPONSIBLE FOR SENDING BY U.S. MAIL IF APPLICABLE.

BANK ACCT TYPE (PLEASE CIRCLE): SAVINGS CHECKING *ATTACHMENT* VOIDED CHECK

NAME OF BANK: _____

ROUTING NUMBER: _____ *BANK ACCT NUMBER:* _____

☐ **OPTION TWO:** I PREFER TO UTILIZE U.S. MAIL. PLEASE ALLOW REFUNDS AND/OR PAYMENTS TO BE SENT OR RECEIVED BY MAIL BETWEEN MYSELF AND FEDERAL & STATE AUTHORITIES. IF MY TAX RETURN CANNOT BE TRANSMITTED ELECTRONICALLY, I WILL BE RESPONSIBLE FOR SENDING BY U.S. MAIL IF APPLICABLE.

DELIVERY OF YOUR RETURN:

☐ Electronic delivery via Confidentail Client Portal
☐ Paper Copy to be Picked Up

Please indicate the QUANTITY of the following source document forms delivered to our office:

☐ Form (s) W-2	☐ Form (s) W-2G gambling winnings
☐ Form (s) 1099 Miscellaneous income	☐ Form (s) 1099S sale of real estate
☐ Form (s) SSA-1099 for Social Security or Disability benefits	☐ Form (s) 1099K (Merchant Card & Third Party Payments)
☐ Form (s) 1099 for interest, dividends & stock transactions	☐ Form (s) 1098-T Tuition Statement
☐ Form (s) K-1 from Partnerships, S-Corporations, or Trusts	☐ Form (s) 1098E for student loan interest
☐ Form (s) 1099-R for pension or retirement distributions	☐ Form (s) 1098 for mortgage interest
☐ Form (s) 1099C or 1099A cancellation or acquisition of debt	☐ Form (s) 1095 A, B or C for healtcare information
☐ Form (s) 1099G Unemployment or State refund	☐ Other: _____

Note: If you think you might qualify for the Earned Income Credit (EIC), please bring proof of dependent relationship and residency, (i.e. Dependent birth certificate and professional document showing dependent's name and taxpayer's address such as school enrollment, bank account info or physician's records.)

General Questions (please indicate "Y" for yes, or "N" for no & provide documentation if applicable):

- [ ] Are you a citizen of the United States?
- [ ] Can you be claimed as a dependent on another's tax return?
- [ ] Did you receive an inheritance or legal settlement in 2018?
- [ ] Did you gift cash or property in 2018?
- [ ] Have you received notice or are you currently under IRS, State or Local examination or audit?
- [ ] Do you have any household employees?
- [ ] Have you had a name change registered with the Social Security Administration in 2018?
- [ ] Did you have a change of marital status?
- [ ] Did you and/or your spouse file bankruptcy in 2018?
- [ ] Did you have debt-forgiveness in 2018?
- [ ] Did you have a sale of your personal residence that you lived in less than 5 of the past 8 years?

Other information (indicate ONLY if it applies to your tax situation)

Indicate Amount if Applicable:

_____ Individual IRA account contributions for 2018 (Indicate if for self and/or spouse)

_____ Roth IRA Contributions for 2018 (Indicate if for self and/or spouse)

_____ Personal property tax amounts (taxes paid on autos, boats, etc.)

_____ Real estate property tax amounts

_____ Alimony Received in 2018 (provide copy of divorce decree unless we already have it)

_____ Alimony Paid in 2018 (provide copy of divorce decree unless we already have it)

_____ Gambling losses (remember to keep receipts)

_____ Out-of-pocket medical expenses

_____ Self-employed or out-of pocket health insurance premiums

_____ Higher education or tuition expenses & which person they are for - including:

_____ Tuition paid in 2018 (even if paid by a loan) - Must have 1098T forms

_____ Course-related books, supplies and equipment

_____ Charitable contributions - non- cash (remember to keep receipts and include the amount on the receipt)

_____ Charitable contributions - cash (remember to keep receipts)

_____ Child care expense information (amount for each child and provider name, address & EIN)

F=_____ S=_____ Date=_____ Estimated tax payments - 1st quarter

F=_____ S=_____ Date=_____ Estimated tax payments - 2nd quarter

F=_____ S=_____ Date=_____ Estimated tax payments - 3rd quarter

F=_____ S=_____ Date=_____ Estimated tax payments - 4th quarter

KCMO=_____ Date=_____ Estimated tax payment with extension by 4/15/19

Any questions or anything unique to your tax situation that is NOT listed above, or that needs explanation, please indicate: _____