2019 TAX ORGANIZER

PLEASE COMPLETE AND DELIVER THIS WITH YOUR 2019 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:	Secondary 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 2019 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 Confidential 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 healthcare information
	Form (s) 1099G Unemployment or State refund		Other: ______________________________

Note: The Child Tax Credit and Earned Income Credit (EIC) are based on dependent relationship and residency. You will be required to attest to your tax preparer that you are eligible to claim dependents as indicated and provide proof such as health insurance coverage form, school enrollment, or physician record.

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 2019?
- [ ] Did you gift cash or property in 2019?
- [ ] Have you received notice or are you currently under IRS, State or Local examination or audit?
- [ ] If over age 65 would you like us to prepare your taxes on a 1040-SR instead of a 1040? (no tax difference)
- [ ] Have you had a name change registered with the Social Security Administration in 2019?
- [ ] Did you have a change of marital status?
- [ ] Did you and/or your spouse file bankruptcy in 2019?
- [ ] Did you have debt-forgiveness in 2019?
- [ ] Did you have a sale of your personal residence that you lived in less than 2 of the past 5 years?

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

Indicate Amount if Applicable:

______ Individual IRA account contributions for 2019 self ______ spouse ______

______ Roth IRA Contributions for 2019 self ______ spouse ______

______ Personal property tax amounts paid in 2019 (taxes paid on automobiles, boats, etc.)

______ Real estate property tax amounts paid in 2019

______ Alimony Received or Paid in 2019 (provide copy of divorce decree unless we already have it)

______ Gambling losses (remember to keep receipts)

______ Out-of-pocket medical expenses ______ Self-paid health insurance premiums

______ Tuition paid in 2019 (even if paid by a loan) - Must provide 1098T forms(s)

______ Course-related books, supplies and equipment & for which student(s)

______ 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

F= ______ S= ______ Date= ______ Estimated tax payment with extension by 4/15/20

KCMO= ______ Date= ______ If you believe you might owe local tax but cannot file by 4/15, we recommend you request an extension form from us or go online to kcmo.gov. This needs to be received by KCMO no later than 4/15/20 to avoid penalty for late payment.

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