

2018 TAX ORGANIZER

Taxpayer Information			Spouse Information				
			Last name	····· –			
				····· _			
Middle Initial Suffix					Suffix		
Social security num	ber		Social security	number	<u> </u>		
Occupation			Occupation	····· _			
Cell phone			Cell phone	····· _			
			E-mail addres	s			
Address					Apartment nu	mber	
				State ZIP Code			
			number				
					_		
Dependent Inform	nation Please list every	1	th you or you financially supp ،	ortea	1 1		
	First name Last name	MI Suffix	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense	
	Last name	Sumx	Relationship	OI BII (II	with raxpayer	Expense	
Child and Danand	lant Cara Dravidar Ev	<u> </u>					
•	lent Care Provider Ex	penses 		ı			
N	ame		Address		ID Number	Amount Paid	
Education Tuition							
Attach all Form 1098	-Ts and a list of your qua	alified education	expenses.				
Student Loan Inte	rest Paid						
Enter total 2018 quali	fied student loan interes	t					
Marital Status as	of Dec 31, 2018						
Never Married	Married Year	Divorced Year	Legally 	Separated Year _	Wid Year	owed 	
Have you, your spouse	e, or dependents been a vict	tim of tax related	identity theft or been issued a	an Identity Protec	tion PIN?	Yes No	
Have you received a le	tter from the IRS? Yes	No	If yes, was a tax crec	lit disallowed in a	prior year?	Yes No	

Attach Form(s) W-2 — Wages, Salaries, Tips and Other Compensation Employer Name		2018 Amount
Attach Form(s) 1099-R — Distributions from Pensions, Annuities, Retire	ment Profit-Sharing	I IRAs etc
1099-R Payer Name		2018 Amount
Attach Form(s) SSA-1099 — Social Security/Railroad Benefits	Taxpayer	Spouse
Social Security Benefits from Form SSA-1099	• •	Spouse
Railroad Retirement Benefits from Form RRB-1099		
Medicare B premiums withheld		-
Medicare C premiums withheld		
Medicare D premiums withheld		
Attach Form(s) 1099-MISC — Miscellaneous Income		
Attach Form(s) 1099-INT — Interest Income 1099-INT Payer Name		2018 Amount
Attach Form(s) 1099-DIV — Dividend Income		2018 Amount
Attach Form(s) 1099-B, 1099-S — Sales of Stocks, Bonds, Real Estate, etc Attach all stock sale transaction information, including initial cost information.		
Other Government Forms to attach: Form(s) 1099-G — Certain Government Payments, Schedule K-1s — Partnership, S-Corpo Gambling or Lottery Winnings, Form(s) 1099-Q — Payments from Qualified Education Pro	oration, Trust or Estate Inc grams	come, Form(s) W-2G -
Other Income:		
Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attac farm you own. Include a list of all new equipment acquired this year, including date of pure times.	h income and expenses for chase and cost.	or any business, rental
	Taxpayer	Spouse
etirement Plan Contributions		
Traditional IRA contributions made for 2018		
Roth IRA contributions made for 2018		
SEP, Keogh, Individual 401(k) or SIMPLE Contributions		

2018 Deductions

Medical and Dental Expenses	2018 Amount	2017 Amount
Prescription medications		
Health insurance premiums		
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes		
Other medical and dental expenses:		
Taxes	2018 Amount	2017 Amount
Real estate taxes paid on principal residence		
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		
Interest Expenses Home mortgage interest paid — Attach Form(s) 1098. Lender's Name	2018 Amount	2017 Amount
Points paid on loan to buy, build or improve main home Lender's Name		
Cash/Check/Credit Contributions	2018 Amount	2017 Amount
Noncash Charitable Contributions Attach all receipts with details listing the following information: Donee, donee address, descr contributed, your cost, value at time of donation, and how you acquired the property.	ption of donation, date a	cquired and date
Miscellaneous Deductions	2018 Amount	2017 Amount
Union and professional dues		
Professional subscriptions, books, supplies		
Uniforms and protective clothing (including cleaning)		
Job search costs		
Taxpayer educator expenses		
Spouse educator expenses		
Tax return preparation fees		
Safe deposit box rental		
Gambling losses (to the extent of gambling income)		

During 2018, did you have a financial interest in or signature authority over a financial account outside the U.S.? Yes

No

2018 Questions

Did you make energy efficient improvements to your home or purchase any energy-saving property during 2018? If yes, please affacts details			Yes	No			
a Did you purchase a motor vehicle or boat during 2018? If yes, attach documentation showing sales tax paid. Did you purchase a hybrid or electric vehicle in 2018? If yes, enter year, make, model, and date purchased: 5 Did you donate a vehicle in 2018? If yes, attach Form 1098C. 6 What was the sales tax rate in your locality in 2018? 7 Did your marital status change during 2018? 8 Were you or your spouse permanently and totally disabled in 2018? 9 Do you have dependents who must file? 9 Do you have dependents who must file? 10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,100? 11 Did you provide over half the support for any other person during 2018? 12 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? 14 Did you receive a total distribution from an IRA or other qualified plan within 60 days of the distribution? 15 Did you receive use of usablity payments in 2018? 16 Did you seceive by income not reported to your employer? 17 Did you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it? 18 Did you incur any casualty or theft losses during 2018? 19 Did you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it? 10 Did you incur any casualty or theft losses during 2018? 10 Did you uncur any casualty or theft losses during 2018? 11 Did you uncur any casualty or theft losses during 2018? 12 Did you uncur any casualty or theft losses during 2018? 13 Did you uncur any casualty or theft losses during 2018? 14 Did you uncur any casualty or theft losses during 2018? 15 Did you uncur any casualty or the first-Time Homebuyer Credit when you purchased it? 15 Did you uncur any casualty or theft losses during 2018? 16 Did you uncur any casualty or theft losses during 2018? 17 Did you uncur any casualty or theft losses during 2018? 18 Did you uncur any casualty or the		Did a lender cancel any of your debt in 2018? (Attach any Forms 1099-A or 1099-C)					
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10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,100?				Н			
11 Did you provide over half the support for any other person during 2018?		·		Н			
12 Did you incur adoption expenses during 2018? 13 Did you receive a total distribution from an IRA or other qualified plan within 160 days of the distribution? 14 Did you receive any disability payments in 2018? 15 Did you receive tip income not reported to your employer? 16 Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2018? If yes, attach closing or escrow statements, 1099-0 or 1099-A forms. 17 Did you incur any casualty or theft losses during 2018? 18 Did you incur any non-business bad debts? 19 Did you pay any individual for domestic services in 2018? 20 Did you buy or sell any stocks or bonds in 2018? 21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? 22 Did you incur any noing expenses? If yes, attach details. 23 Did you receive any income not included in this Tax Organizer? 15 If yos, please attach information. 24 Do you expect your income and deductions in 2019 to be the same as 2018? 25 Did you and your dependents have health insurance coverage for the full year? 26 If you paid any allimony, enter recipient's SSN: 27 Enter your state of residence. 28 Did you receive any of the following IRS documents? Forms 1095-A (Health Insurance Marketplace Statement), Form 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage)? If so, please attach. 29 If you paid any allimony, enter recipient's SSN: 20 If you paid any allimony, enter recipient's SSN: 21 Enter your state of residence. 22 Enter your state of residence. 23 Did you are feeling and Direct Deposit of Refund 24 If you paid any allimony, enter recipient's SSN: 25 Enter your state of residence. 26 If you paid any allimony, enter recipient's SSN: 27 Enter your state of residence. 28 Did you are a feeling and Direct Deposit of Refund 29 If yes, please provide a voided check (not a deposit slip) if your bank account information has changed. 29 What yee of account			_	Н			
13 Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?				Н			
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15 Did you receive tip income not reported to your employer? 16a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2018? If yes, attach closing or escrow statements, 1099-C or 1099-A forms. b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it? 17 Did you incur any casualty or theft losses during 2018? 18 Did you pay any individual for domestic services in 2018? 19 Did you buy or sell any stocks or bonds in 2018? 20 Did you buy or sell any stocks or bonds in 2018? 21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? 22 Did you incur any moving expenses? If yes, attach details. 23 Did you receive any income not included in this Tax Organizer? 14 Do you expect your income and deductions in 2019 to be the same as 2018? 15 If no, attach explanation of changes expected. 25a Did you and your dependents have health insurace coverage for the full year? b Did you receive any of the following IRS documents? Forms 1095-A (Health Insurance Marketplace Statement), Form 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage)? If so, please attach. 26 If you paid any alimony, enter recipient's SSN: Alimony paid: 27 Enter your state of residence. Taxpayer Spouse Electronic Filing and Direct Deposit of Refund If yes, lease provide a voided check (not a deposit slip) if your bank account information has changed. West type of a refund, would you like direct deposit? 17 you receive a refund, would you like direct deposit? 18 Journal of the providence and the providence of the pr		or qualified plan within 60 days of the distribution?					
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