Taxpayer					SSN		
First	M.I.	Last		Email	I	IP PIN	
Occupation		Date	of birth		Are you nev	v to our firm?	Yes No
Address		City			State	Zip	
County		Home	e phone		Work or cell		
Driver's License No.				State	Issue Date	Exp. Date	
Spouse					SSN		
First	M.I.	Last		Email		IP PIN	
Occupation		Date	of birth		Are you nev	v to our firm?	Yes No
Address (If different from Taxpayer)		City			State	Zip	
County		Home	e phone		Work or cell		
Driver's License No.				State	Issue Date	Exp. Date	
If you moved during 2019, enter your	previous address	6.			Date of mov	re	
Marital status at 12/31/19: Single Were you divorced or separated durin Individuals who are in registered dom Have you received any notice from th	ng the year? Ye nestic partnership	os (RDF	o Ps) and civil uni	Were there any	d Domestic Partne deaths in the fan dered married for Yes No	nily? Yes No	
Names of dependent children Child's full name	Social Secur		IP PIN	Date of birt	Months lived h home in 2019	1	College student?
Did any of the children have income a Is it anticipated that a different taxpay	ver will seek to cla	2		2	f the children hav ent for tax year 20		Yes No
Other dependents or people who liv	ed with you				Months lived in		
Name	Social Security	#	IP PIN	Date of birth	home in 2019	Relationship	Income
	eposit of refund	Dire	ct debit of balan	ce due Name of			
	nsit number		1	Account nu			
Ask your tax preparer for information	about depositing	g a refu	ind into an IRA	account or splitti	ng the deposit inf	to more than one	account.

Questions—All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—enter "?" if unsure about a question.

100	Telefs	10 00	ui taxpayer and spo	use—enter	i il ulisule about	a question.				
	Yes	No	Are either you or y	our spouse le	egally blind?					
	Yes	No	Did you pay or rec Paid Receive		in 2019?	Recipient's SSN		Date of divorce of	ər sepa	ration
	Yes	No	Did you have healt	h insurance f	for you, your spous	se, and all depend	ents for the entire	e year?		
	Yes	No	Did you purchase l	nealth insura	nce through a publ	ic exchange?				
	Yes	No	Will there be any si	gnificant cha	nges in income or	deductions next y	ear, such as retire	ement?		
	Yes	No	Have you paid alte	rnative minii	mum tax (AMT) in	previous years?				
	Yes	No	Did you pay anyor	e for domest	ic services in your	home?				
	Yes	No	Did you purchase a	n new energy	-efficient car, truck	, or van?				
	Yes	No	Are you involved i	n bankruptcy	, foreclosure, repos	ssession, or had ar	ny debt (including	g credit cards) ca	ncelle	d?
	Yes	No	Are you a member	of the militar	ry?					
	Yes	No	Were you a citizen	of or lived in	a foreign country?					
	Yes	No	Do you own or hav	re financial ir	terest in a foreign	bank or financial a	account?			
	Yes	No	Would you like to a Designee's name	allow your ta		ner person to discu <i>1e number</i>	uss your return w	vith the IRS? PIN (any five a	ligits)	
	Yes	No	Were any children	born or adop	ted in 2019? (Provid	de statement for oth	er expenses.)			
	Yes	No	Were any children		Paid by you: Tuit	ion \$	Student loan int	erest \$	Book	:s \$
			attending college?	college	Paid by student:	Tuition \$	Student loan int	erest \$	Book	:s \$
	Yes	No	Did you pay any tu	uition for a pr	rivate school for a c	lependent or take	classes yourself?			
			Student					Amount paid \$		
			Name and address of	school						
	Yes	No	Did you pay for ch	ild or depend	lent care so you co	uld work or go to	school? (add state	ment if needed)		
			Name of provider					EIN or SSN		
			Address					Amount paid \$		
	Yes	No	Do you have any c	hildren who	earned more than §	52,200 of investme	nt income?			
	Yes	No	Did you make any	contributions	s to a 529 plan in 20)19?				
	Yes	No	Did you, or will yo	u, contribute	any money to an I	RA for 2019?		Traditional I	RA	Roth IRA
	Yes	No	Did you roll over a	ny amounts i	from a retirement a	account in 2019?				
	Yes	No	Did you sell or trar	nsfer any stoc	k or sell rental or i	nvestment proper	ty?			
	Yes	No	Did you receive an	y income from	m an installment sa	ale?				
	Yes	No	Did you have any i	nvestments b	become worthless o	or were you a victi	m of investment	theft in 2019?		
	Yes	No	Were you granted,	or did you e	kercise, any employ	vee stock options o	during 2019?			
	Yes	No	Did you receive, se	ll, send, exch	ange, or otherwise	acquire any finan	cial interest in an	y virtual currend	cy?	
	Yes	No	Did you pay any ir	iterest on a lo	an for a boat or RV	⁷ that has living qu	uarters? If yes, pro	ovide details.		
	Yes	No	Did you pay sales t	axes on a ma	jor purchase in 201	9, such as a vehic	le, boat, or home	?		
	Yes	No	Did you make any	charitable co	ntributions in 2019	?				
	Yes	No	Did you work from	a home offic	e or use your car f	or business?				
	Yes	No	Did you receive inc	come from a s	sharing/gig econor	my activity (e.g. A	irbnb, Uber, etc.)			
	Yes	No	Do you own a busi	ness or an in	terest in a partners	hip, corporation, I	LLC, farming acti	vities, or other v	enture	?
	Yes	No	Did you purchase o	or sell a main	home during the y	ear? If yes, provid	e closing stateme	nt.		
	Yes	No	If you sold a home,	did you clair	n the First-Time H	omebuyer Credit v	when it was purch	hased? If yes, pro	ovide c	letails.
	Yes	No	Did you refinance a	-		-	-			
	Yes	No	Did you use any m		_	-	-		ve yoı	ur home?
	Yes	No	Did you make any	~ ~			-			
tate	infor	matio				Nonresident				
			e during 2019 and d		*					
	ol dist		0				Do you rept o	r own vour hom	e? R	ent Or

School district

Income Worksheet

Provide to your preparer all Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, and other income reporting statements. Do not list dollar amounts for the following forms. Your preparer will report the appropriate amounts.

Indicat	e "T" for taxpayer, "S" for spouse, "J" for joint				Pro	vide additional statemen	ts if more room is needed	
Forms	W-2—Wage and Tax Statement							
T/S	Employer name			T/S	Employ	er name		
	1)				4)			
	2)				5)			
	3)				6)			
Forms	1099-INT—Interest Income							
T/S/J	Name of issuer	T/S/J Name of issuer						
	1)				4)			
	2)				5)			
	3)				6)			
Forms	1099-DIV—Dividends and Distributions							
T/S/J	Name of issuer			T/S/J	Name of	f issuer		
	1)				4)			
	2)				5)			
3)					6)			
Forms	1099-R—Distributions From Pensions, Annuiti	ies, Ret	irement	t or Profit	-Sharing l	Plans, IRAs, Insurance C	ontracts, Etc.	
T/S	Name of issuer T/S Name of issuer							
	1)				4)			
	2)				5)			
	3)				6)			
If the d	istribution is before age 59½, give a reason to de	etermin	ne if an e	exception	to penalty	applies.		
Tax-Ex	empt Interest (such as municipal bonds—inclu	de state	ement)					
Payer	\$			Payer			\$	
Other 1	Income						·	
State ta	x refund		\$			Other	\$	
Unemp	oloyment compensation		\$				\$	
	Security (taxpayer)—provide SSA-1099 or RRB-	1099	\$				\$	
Social S	Security (spouse)—provide SSA-1099 or RRB-10)99	\$				\$	
Unrepo	orted tips		\$				\$	
Busine	ss income (see Sole Proprietorship Tax Organizer)					Stock sales	See "Sales and Exchanges	
Rental	income (see Rental Property Tax Organizer)					Sale of other property	Worksheet" below.	
Sale	es and Exchanges Workshee	et						
	e information about sales of stock, real estate, or		propert	v along w	vith Forms	1099-B 1099-S or other	supporting statements	
110/10	e internation about bares of stock, real estate, of	. outer	r open	<i>,,</i>		, 10, 7 D, 10, 7 D, 01 Offici	supporting statements.	

_				
Description of property	Purchase date	Cost/basis	Sale date	Sale price
		\$		\$
		\$		\$
		\$		\$

Notes:

• When stock is sold, you will usually receive Form 1099-B, *Proceeds From Broker and Barter Exchange Transactions*, reporting the proceeds from the sale. However, your statement will not always provide the cost/basis information necessary to compute gain or loss. If the statement does not contain the cost/basis information, you must provide it. You may need to contact your broker for questions about cost/basis and purchase dates of your stock accounts.

• Often, "transfers" of stock or mutual funds within a brokerage account are actually sales of one type of stock and purchase of another. Even if you did not receive any cash from the transaction, you may have taxable gain or loss.

• If your stock dividends are automatically reinvested, the dividends will be taxable even though you did not receive any cash. The transaction is treated as if you had received cash and purchased additional stock. When the stock is sold, the amount reinvested over the years is taken into account. You may need to contact your broker for questions about the amount of reinvested dividends.

• If you sold property other than stock, your taxable gain or loss will be determined by your cost/basis. The cost/basis is usually the original purchase price plus improvements (the cost of repairs and maintenance are not taken into account for cost/basis).

Itemized Deductions Worksheet

Deductions must exceed \$12,200 Single, \$24,400 MFJ, \$18,350 HOH, or \$12,200 MFS to be a tax benefit.

$ \begin{array}{c c c c c c } \hline Dentists & $ & Insurance & $ & Noncash contributions (FMV). Clothing or household items must be in good condition or better. & $ & S & Noncash contributions (FMV). Clothing or household items must be in good condition or better. & $ & S & S & S & S & S & S & S & S & S$		enses. Must exceed b or dependents—do r or insurance.					vide details of con	\$500 in noncash cha ntributions. Rules rec all contributions.		
Equipment\$Prescriptions\$Items must be in good used condition or better.\$Eyeglasses\$Other\$Did you transfer funds from an IRA directly to a charity? Yes No\$Medical miles: $@ 20e$ Charitable mileage\$Did you transfer funds from an IRA directly to a charity? Yes No\$Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home.If you suffered any sudden, unexpected damage or loss of property, a theft in a federally-declared disaster area, provide details to your to prepare. Yes NoState estimated taxes—paid in 2019\$If you suffered any sudden, unexpected damage or loss of property, a theft in a federally-declared disaster area, provide details to your to prepare. Yes NoReal estate tax—other\$Miscellaneous Itemized Deductions. Miscellaneous itemized deductions subject to the 2% AGI limitation are no longer deductible on the federal return. However, these expenses may still be deductible on your state return. For use of home, auto mileage, or other job-rela expenses, provide information on a separate sheet. Were any expense reimbursed by your unployer? Yes NoProperty tax refund—received in 2019\$ ()Proteign tax paid\$Other\$Gother\$Balance paid in 2019 from prior year state returns (do not include interest or penalites)Sold you purchase a car, plane, boat, or home in 2019? Yes NoSafes tax paid DateDid you purchase a car, plane, boat, or home in 2019? Yes NoSafety equipmentSafety equipmentMain homeEqual y loan	Dentists	\$	Hospitals	\$		Cash			\$	
Induption EyeglassesInstruction sDid you transfer funds from an IRA directly to a charity? YesNoEyeglasses\$Other\$Charitable mileage\$Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home.Charitable mileageCharitable mileageState withholdingReported on W-2If you suffered any sudden, unexpected damage or loss of property, a theft in a federally-declared disaster area, provide details to your to preparer. YesIf you suffered any sudden, unexpected damage or loss of property, a theft in a federally-declared disaster area, provide details to your to preparer. YesReal estate tax—residence\$Miscellaneous Hemized Deductions. Miscellaneous itemized deductions subject to the 2% AGI limitation are no long=r deductible on your state return. However, these expenses may still be deductible on your state return. For use of home, auto mileage, or other job-rela expenses, provide information on a separate sheet. Were any expense 	Doctors	\$	Insurance	\$						
Pregrasses * Other * charity? Yes No \$ Medical miles:	Equipment	\$	Prescriptions	\$		items must be in g	ood used condition	on or better.	\$	
Medical miles: @ 20¢ Charitable mileage Charitable mileage Taxes Paid. Do not include taxes paid for full or partial business or rental-use property, including business use of the home. Casualty and Theft Losses If you suffered any sudden, unexpected damage or loss of property, a theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta theft in a federally-declared disaster area, provide details to your ta ta federal return. However, these expenses may still be deductified on your state return. For use of home, auto mileage, or other ipo-rely, and a property ta refund — received in 2019 \$ Dues \$ Subscriptions \$ Foreign tax paid \$ Dues \$	Eyeglasses	\$	Other	\$				directly to a	<i>ф</i>	
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State estimated taxes—paid in 2019 \$ a theft in a federally-declared disaster area, provide details to your tare state at						· · · · · · · · · · · · · · · · · · ·				
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Other\$expensesImage: Constraint of the section of the	Other			\$		Dues	\$	Subscriptions	\$	
Other\$1Job education\$Tax prep fees\$Balance paid in 2019 from prior year state returns (do not include interest or penalties)\$Job education\$Tax prep fees\$Job seeking\$Tools\$\$\$\$\$\$Did you keep receipts for sales tax paid during 2019? Jou you purchase a car, plane, boat, or home in 2019? Sales tax paid \$YesNoLegal fees\$Uniforms\$Interest Paid.Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.\$Other Deductions. The following deductions are not subject to a 29 income limit.Main home\$Equity loan\$Gambling losses\$Federal estate tax on IRD\$Second home\$Equity loan\$Impairment-\$Loss from box 2, s\$	Other			\$			\$	Supplies	\$	
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Did you nech for suice but your during 2019. Yes No Did you purchase a car, plane, boat, or home in 2019? Yes No Sales tax paid \$ Purchase paid \$ Date Interest Paid. Do not include interest paid for full or partial business or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers. Safety equipment \$ Other \$ Main home \$ Equity loan \$ Gambling losses \$ Federal estate tax on IRD \$ Second home \$ Equity loan \$ Impairment- \$ Loss from box 2, \$				\$		Job seeking	\$	Tools	\$	
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Main home\$Equity loan\$Gambling losses\$Federal estate tax on IRD\$Second home\$Equity loan\$Impairment-\$Loss from box 2,\$	or rental-use p	roperty, including b	usiness use of the h				s. The following	deductions are not s	ubject to a 2% of	
Inpairment- 5 Loss from box 2, 5				\$		Gambling losses	\$		\$	
	Second home	\$ I	Equity loan	\$		Impairment-	\$	Loss from box 2.	\$	
Points \$ related expenses K-1, Form 1065B	Points	\$ 1	nvestment interest	\$		related expenses				

Other Deductions or Questions

Notes: • Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses.
• Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots.

• Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible.

Adjustments Worksheet

Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$250 each.	\$
Health savings account deduction (HSA).	\$
Self-employed SEP, SIMPLE, and qualified plans. Some contributions for 2019 may be made in 2020.	\$
<i>Self-employed health insurance deduction.</i> Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.	\$
Penalty on early withdrawal of savings.	\$
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Some contributions for 2019 may be made in 2020.	\$
Student loan interest deduction. Paid for taxpayers and dependents. Income limits apply.	\$
<i>Tuition and fees deduction.</i> Qualified tuition and fees if not claiming education credits. Income limits apply.	\$
<i>Moving expenses.</i> Available only to members of the Armed Forces (or their spouses or dependents) on active duty that move pursuant to a military order and incident to a permanent change of station.	Ask preparer
Business expenses of reservists, performing artists, and fee-based government officials.	Ask preparer

Estimated Tax Payments — Tax Year 2019

Date paid	Federal	Date paid	State
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$

Tax Preparation Checklist

Please provide the following documentation:

All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.

Form 1095-A (for health insurance purchased through a public exchange), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).

If you are a new client, provide copies of last year's tax returns.

The completed Individual Income Tax Organizer. *Note:* If you choose not to fill out the organizer, you must at least answer the "Yes" or "No" questions under "Questions—All Taxpayers."

Copy of the closing statement if you bought or sold real estate.

Mileage figures for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage. Detail of estimated tax payments made, if any.

Income and deductions categorized on a separate sheet for business or rental activities.

List of itemized deductions categorized on a separate sheet for medical, taxes, interest, charitable, and miscellaneous deductions. Copy of all acknowledgement letters received from charitable organizations for contributions made in 2019.

Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.