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Thank you for allowing us to assist you with your tax matters. The following questionnaire is designed to assist you in preparing your personal and business income tax returns. While not all encompassing, the format is straightforward: Read each question and answer yes or no. If the answer is yes, then look to complete the detail portion of each question. If necessary attach the supporting documents in the same order as the questions, or write them on the back of the sheet. Tax laws change on a routine basis, so don't be surprised if something is not included here, but that you know might affect your current year tax return. There is a section on the last page to add other questions or comments. Also, let us know if you see something that would improve this form.

**NOW LET'S GET STARTED!**

1. We need to review your prior year tax return and supporting documents. Have you included them with your other supporting documents? YES NO
2. Do we have you & your dependents complete names, SS #'s, & birthdays? YES NO  
If not, please list: \_\_\_\_\_
3. Have you supported anyone else this past year that may or may not have lived with you in your home for all or a portion of the year? YES NO
4. Do we have your current address and phone numbers? YES NO  
If not please list: \_\_\_\_\_
5. Do we have your current occupation titles? YES NO  
If not please list: \_\_\_\_\_
6. Do you want to donate to the Presidential Election Campaign Fund? YES NO
7. Have you been a resident of Arizona all year? YES NO  
If not what state(s) did you reside in, and what date(s) did you move into (or out of) Arizona or the other states? \_\_\_\_\_
8. Did you or your spouse receive or pay alimony? YES NO  
If so, we need the name and social security number of the person paid. \_\_\_\_\_
9. Have you supplied us with all copies of relevant W-2's? YES NO
10. Have you supplied us with information regarding interest and dividend income earned from banks and other financial institutions? YES NO
11. Have you supplied us with information regarding capital gains/losses on taxable mutual fund sales and stock sales, including purchase date, cost and any adjustments due to splits, dividends or other types of reinvestment? YES NO
12. Did you itemize last year and receive a refund back from the state? YES NO  
If so, how much was the refund? \_\_\_\_\_
13. Did you receive or pay back any unemployment compensation? YES NO
14. Did you receive any pension or social security income? YES NO  
If so please attach the forms 1099's and/or other supporting forms.
15. Did you receive any income from the following (please circle and attach information)? Rental income, royalties, income from trusts, partnerships, or S Corporations (please attach K-1 statements), farm income, self-employment income, gambling winnings, other winnings from prizes or unusual sources? YES NO
16. Did you and/or your spouse take money from a qualified retirement account/IRA? YES NO  
If so did you roll it to another qualified account within 60 days? YES NO  
If so please attach forms 1099-R.

**TAX ORGANIZER-PAGE 2**

17. Did you receive any other income of any type, including any reimbursement of previously deducted bad debts, casualty/theft losses, jury duty, foreign earned income, a child's investment income, tip income, previously deducted medical expenses, etc.? YES NO
18. Are you or did you contribute to an IRA or Roth IRA for the current tax year? YES NO
19. Have you converted a traditional IRA to a Roth IRA within the last year? YES NO
20. Did you pay any student loan interest in the current tax year? YES NO
21. Did you pay directly or indirectly for the cost of college education? YES NO  
If so, how much in tuition, books, fees, and other expenses did you pay?
22. Did you receive an expense statement from the institution of higher learning? YES NO
23. Did you contribute to a Medical Savings Account, Health Savings Account, or High Deductible Health Plan? YES NO
24. Did you move more than 50 miles for work related purposes? YES NO
25. Did you make contributions to a SIMPLE or SEP Plan? YES NO
26. Did you pay any self employed health insurance premiums? YES NO
27. Did you incur any premature withdrawal penalties from a certificate of deposit? YES NO
28. If self-employed have you given us all information regarding income/expenses? YES NO
29. For Schedule A itemized deduction purposes, please answer the following:
- Have you listed all of your medical expenses, including long term care premiums? YES NO
- Have you listed all your vehicle license tax, sales tax, and real estate taxes paid? YES NO
- Have you listed all interest paid information on your mortgage(s)? YES NO
- Have your refinanced or bought a house and paid MIP Insurance? YES NO
- Have you listed all charitable contribution information, including cash, checks and items donated to charities? YES NO
- Did you include a detailed breakdown of the items donated, when and to who donated, their address, the original cost of the items donated, the value of the items donated on the date of the donation, and how you determined their value? YES NO
- Did you have any SIGNIFICANT casualty or theft loss that was not reimbursed by insurance? YES NO
- Did you incur any work related expenses that were not reimbursed by your employer? This would include cell phone expenses, work related driving miles, other than commuting, union dues, tools, specific clothing/uniform expenses, items purchased to assist you in doing your job, meals and entertainment related to your work, and expenses incurred to work out of your home for the convenience of your employer YES NO
- Did you incur any non-business bad debts where you loaned money or items to someone with the realistic expectation that would pay you back and they didn't. Now it is impossible to collect the money or items from them? YES NO
- Have you informed us of all gambling winnings and losses? YES NO
- Did you incur any legal expenses for the collection or preservation of income or assets? YES NO
- Did you incur any job search expenses this past year? YES NO
- Did you pay to have your tax return completed in the prior year? YES NO
- Did you pay a safe deposit box fee, IRA custodial fee or investment publication expenses? YES NO
- Did you surrender an Annuity contract or ROTH IRA in which the value received was less than the purchase/investment costs? YES NO
30. Did you pay for day care expenses for your young children? YES NO



**TAX ORGANIZER-PAGE 3**

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|-----|--|-----|----|
|     | If so do you have the day care providers address and tax ID number   | YES | NO |
| 31. | Do you hold a Qualified Mortgage Credit Certificate?   | YES | NO |
| 32. | Did you abandon, have foreclosed, or do a short sale on your primary residence or an investment property?  | YES | NO |
| 32. | Are you entitled to a low-income housing credit?   | YES | NO |
| 33. | Did you buy or install any residential energy oriented items?  | YES | NO |
| 34. | Did you start a pension plan for your small business?  | YES | NO |
| 35. | Did you pay any foreign taxes?   | YES | NO |
| 36. | Are you aware or entitled to any other credits not mentioned?  | YES | NO |
| 37. | Did you make estimated federal or state tax payments?  | YES | NO |
| 38. | Did you contribute to any state education credit programs?   | YES | NO |
| 39. | Do want us to calculate estimated payments for the new tax year?   | YES | NO |
| 40. | Do you want any of your refund(s) to be used for estimated tax payments?   | YES | NO |
| 41. | Do you want to make any charitable contributions with your state refund?   | YES | NO |
| 42. | Do you anticipate a significant change in income this year?  | YES | NO |
| 43. | If you want to have a direct deposit (which we recommend) of your federal and state refunds, please list your primary financial institution, their routing number, and your account number. If you do not know these numbers, please include a voided check. |     |    |
|     | _____  |     |    |
|     | _____  |     |    |
|     | _____  |     |    |
| 44. | Do you want to preschedule your future tax appointment now?  | YES | NO |
| 45. | Do you NOT want to file electronically?  | YES | NO |
| 46. | Did you sell, give back, or convert to investment use a primary personal residence in which you received a first time home buyer credit?   | YES | NO |

Other notes and comments:

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Under penalty of perjury I (We) declare that this tax organizer has been completed to the best of my (our) belief and knowledge and that all questions have been answered honestly and truthfully.

_____ Signature	_____ date	_____ Signature	_____ date
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