

A-ADVANTAGE Tax and Financial Services

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CLIENT TAX ORGANIZER-please circle the answer and complete as necessary

Do we have you and your dependents complete names, social security numbers and dates of birth?

YES NO

If not, please list

Do we have your current mailing address and phone numbers?

YES NO

If not please list:

Do we have your current occupation titles?

YES NO

Do you want to donate to the Presidential Election Campaign fund?

YES NO

Have you been a resident of Arizona all year?

YES NO

If not what state did you reside in, and when did you move into (or out of) Arizona?

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.

Have you supplied us with all copies of relevant W-2's?

YES NO

Have you supplied us with information regarding interest and dividend income earned from banks and other financial institutions?

YES NO

Have you supplied us with information regarding capital gains/losses on taxable mutual fund sales and stock sales?

YES NO

Did you itemize on your tax return in the prior year and receive a refund back from the state of residency that you live in?

YES NO

If so, how much was the refund? _____

Did you receive or pay back any unemployment compensation?

YES NO

Did you receive any pension or social security income?

YES NO

If so please attach the forms 1099's

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

Did you or your spouse, if applicable take a distribution 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 1099-R

TAX ORGANIZER-PAGE 2

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, etc.?	YES	NO
Did you or are you planning on contributing to an IRA or Roth IRA for the current tax year?	YES	NO
Did you pay any student loan interest or pay any education expenses in the current tax year?	YES	NO
Did you contribute to a Medical Savings Account, Health Savings Account, or High Deductible Health Plan?	YES	NO
Did you move more than 50 miles?	YES	NO
Did you make contributions to a SIMPLE or SEP Plan?	YES	NO
Did you pay any self employed Health Insurance Premiums?	YES	NO
Did you incur any premature withdrawal penalties from a savings account or a certificate of deposit?	YES	NO
If self-employed have you given us all information regarding income and expenses?	YES	NO
For Schedule A itemized deduction purposes, please answer the following:		
Have you listed all of your medical expenses?	YES	NO
Have you listed all your personal, 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 whom 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 costs?	YES	NO
Did you pay for day care expenses for your young children?	YES	NO
Did you pay education expenses for post secondary education?	YES	NO
Do you hold a Qualified Mortgage Credit Certificate?	YES	NO
Are you entitled to a low-income housing credit?	YES	NO

TAX ORGANIZER-PAGE 3

Did you start a pension plan for your small business?	YES	NO
Did you receive advanced Earned Income Credit?	YES	NO
Did you install any high efficiency heating or cooling systems in your home?	YES	NO
Did you purchase a hybrid vehicle that qualifies you for a tax credit?	YES	NO
Did you pay any foreign taxes?	YES	NO
Are you aware or entitled to any other credits not mentioned?	YES	NO
Did you make estimated federal or state tax payments?	YES	NO
Did you contribute to any state education credit programs?	YES	NO
Do want us to calculate estimated payments for the new tax year?	YES	NO
Do you want any of your refund(s), if applicable, to be used for your estimated tax payments?	YES	NO
Do you anticipate a significant change in income this year?	YES	NO
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.		
Do you want to preschedule your future tax appointment now?	YES	NO

Other notes and comments:

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

Signature

date

signature

date