



Thank you for allowing us to assist you with your tax matters. This 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 circle 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 those items 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 on back of page
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
5. Do we have your current occupation titles? YES NO
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(forms 1099-int, div, or brokerage) 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.
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



TAX ORGANIZER PAGE 2

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| 18. | Have you or will 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 HSA, or HDHP? | 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(exceeding 10% of your income) 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 they 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, investment management fees, 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 or other dependents? | YES | NO |
| | If so do you have the day care provider's address and tax ID number? | YES | NO |
| 31. | Do you hold a Qualified Mortgage Credit Certificate? | YES | NO |



TAX ORGANIZER PAGE 3

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| 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 or have any foreign income? | 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 |
| 47. | Would you like your return mailed to you via PDF electronic file? | YES | NO |
| 48. | Are you buying health insurance via the Federally Facilitated Marketplace? | YES | NO |
| 49. | If so, did you have the insurance for all 12 months of the year? | YES | NO |
| 50. | Do you have any dependents that do not have health insurance? | YES | NO |
| 51. | If yes, we will need to know how much income they earned | | |
| 52. | Do you want to participate in our tax season ending party, our shredding party, or any of our other 'FUN' events? | YES | NO |
| 53. | Are you aware that WE LOVE REFERRALS and that we give a 10% discount to the referred party?(we also send a crisp \$10 bill to you!) | YES | NO |

Other notes and comments:

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