2019 Individual Taxpayer Organizer

MLN Accounting & Tax Service, LLC thanks you for being a valued client and choosing us to assist with your tax filing for another year. We will prepare your federal and state income tax returns. To do so we need you to provide your tax documents and complete this tax organizer. Please utilize this tax organizer to help you collect the data required for your tax return. The organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your tax return and help us get you the best tax results.

***RETURNING CLIENTS should not duplicate sensitive information such as social security number and date of birth as we already have that information on file. Only include dependent name to confirm you are claim the same dependents as last year. Birth, adoption or fostering a new child requires all information for that dependent to be filled out.

Taxpayer							SSN			
First	Las	t	Em	ail		IP IP				
Occupation			of birth			Are you nev	w to our	PIN : firm?	Yes	No
Address		City				State		Zip		
								r		
County		Hom	ne phone			Work or cel	1			
Driver's License No.				Stat	te	Issue Date		Exp. Date		
Spouse						SSN				
First	M.I.	Las	t	Em	ail	'		IP PIN		
Occupation		Date	of birth			Are you nev	w to our	firm?	Yes	No
Address (If different from Taxpayer)		City				State		Zip		
County		Hom	ne phone			Work or cel	Work or cell			
Driver's License No.		ı		Stat	te	Issue Date		Exp. Date		
If you moved during 2019, enter your	previous addres	s.				Date of mov	<i>т</i> е			
Marital status at 12/31/19: Single	Married	Separa	nted Widow	(er)	Registered	d Domestic Partn	ership (RDP)	Uns	ure
Were you divorced or separated during						deaths in the far	-	Yes N		
Individuals who are in registered dom						dered married fo	r federa	l tax purp	oses	•
Have you received any notice from the	e IRS or state rev	enue c	department with	nin th	ne past year?	Yes No				
Names of dependent children Child's full name	Social Secu	rity#	IP PIN		Date of birt	Months lived h home in 201		ationship t taxpayer		College udent?
								1 3		
Did any of the children have income a		-			-	f the children hav		ability?	Yes	No
Is it anticipated that a different taxpay	er will seek to cl	aim a (child listed abov	e as	their depend	ent for tax year 2	019?	Yes No)	
Other dependents or people who live	ed with you									
Name	Social Security	#	IP PIN	I	Date of birth	Months lived in home in 2019	Relati	onship	Inc	соте
Bank information: Use for Direct de	eposit of refund	Dire	ect debit of balar	nce d	lue Name of	bank				
Checking Savings Routing tran	ısit number				Account nu	ımber	er			
Ask your tax preparer for information	about depositin	g a ref	und into an IRA	acco	ount or splitti	ng the deposit in	to more	than one	acco	unt.

"You" refers to both taxpayer and spouse—enter "?" if unsure about a question. Are either you or your spouse legally blind? No Did you pay or receive alimony in 2019? Recipient's SSN Date of divorce or separation Yes Paid Received \$ Yes No Did you have health insurance for you, your spouse, and all dependents for the entire year? Did you purchase health insurance through a public exchange? Yes No Yes No Will there be any significant changes in income or deductions next year, such as retirement? LIFESTYLE & TAXES Yes No Have you paid alternative minimum tax (AMT) in previous years? Yes No Did you pay anyone for domestic services in your home? Yes No Did you purchase a new energy-efficient car, truck, or van? Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled? Yes No No Are you a member of the military? Yes Were you a citizen of or lived in a foreign country? Yes No Do you own or have financial interest in a foreign bank or financial account? Yes No Would you like to allow your tax preparer or another person to discuss your return with the IRS? Yes No PIN (any five digits) Designee's name Phone number Yes Were any children born or adopted in 2019? (Provide statement for other expenses.) No Were any children Paid by you: Tuition \$ Books \$ Yes No Student loan interest \$ attending college? college Paid by student: Tuition \$ Student loan interest \$ Books \$ CHILDREN & EDUCATION Yes Did you pay any tuition for a private school for a dependent or take classes yourself? No Student Amount paid \$ Name and address of school Did you pay for child or dependent care so you could work or go to school? (add statement if needed) Yes Name of provider EIN or SSN Address Amount paid \$ Do you have any children who earned more than \$2,200 of investment income? Yes No Yes No Did you make any contributions to a 529 plan in 2019? Yes No Did you, or will you, contribute any money to an IRA for 2019? Traditional IRA Roth IRA Yes No Did you roll over any amounts from a retirement account in 2019? INVESTMENTS Yes No Did you sell or transfer any stock or sell rental or investment property? Yes No Did you receive any income from an installment sale? Yes Did you have any investments become worthless or were you a victim of investment theft in 2019? No Were you granted, or did you exercise, any employee stock options during 2019? Yes No Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No Yes DEDUCTIONS No Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details. Yes No Did you pay sales taxes on a major purchase in 2019, such as a vehicle, boat, or home? Yes Did you make any charitable contributions in 2019? No BUSINESS Yes No Did you work from a home office or use your car for business? Yes No Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.) Yes Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture? No Yes No Did you purchase or sell a main home during the year? If yes, provide closing statement. If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details. Yes No Yes No Did you refinance a mortgage or take a home equity loan? (Provide closing statement) Yes No Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home? Yes No Did you make any new energy-efficient improvements to your home? If yes, provide details. Part-year resident Nonresident State information Full-year resident States of residence during 2019 and dates School district Do you rent or own your home? Rent Own

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 j	oint			Pro	vide additional statemer	its if more room is needed		
Forms	W-2—Wage and Tax Statement								
T/S	Employer name			T/S	Employ	Employer name			
	1)				4)				
	2)				5)				
	3)				6)				
Forms	1099-INT—Interest Income								
T/S/J	Name of issuer			T/S/J	Name o	fissuer			
	1)				4)				
	2)				5)				
	3)				6)				
Forms	1099-DIV—Dividends and Distributions								
T/S/J	Name of issuer			T/S/J	Name o	Name of issuer			
	1)				4)	4)			
	2)				5)	5)			
	3)				6)				
Forms	1099-R—Distributions From Pensions, Ar	ınuities, Reti	irement	t or Profit	-Sharing l	Plans, IRAs, Insurance C	ontracts, Etc.		
T/S	Name of issuer			T/S	Name o	fissuer			
	1)				4)	4)			
	2)				5)	5)			
	3)				6)				
If the d	istribution is before age 59½, give a reason	to determin	e if an	exception	to penalty	y applies.			
Tax-Ex	empt Interest (such as municipal bonds—	include state	ement)						
Payer	-	\$		Payer			\$		
Other l	Income			•			·		
State tax refund			\$			Other	\$		
Unemployment compensation			\$				\$		
Social Security (taxpayer)—provide SSA-1099 or RRB-1099			\$				\$		
Social Security (spouse)—provide SSA-1099 or RRB-1099			\$				\$		
Unreported tips			\$				\$		
Business income (see Sole Proprietorship Tax Organizer)				1		Stock sales	See "Sales and Exchange		
	Rental income (see Rental Property Tax Organizer)						Worksheet" below.		

Sales and Exchanges Worksheet

Provide information about sales of stock, real estate, or other property, along with Forms 1099-B, 1099-S, or other 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.

Medical Expenses. Must exceed 10% of income to be a benefit—include cost for dependents—do not include any expenses that were reimbursed by insurance.			Charitable Contributions. If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.							
Dentists	\$	Hospitals	\$	Cash						
Doctors	\$	Insurance	\$	Noncash contribut						
Equipment	\$	Prescriptions	\$		items must be in good used condition or better.					
Eyeglasses	\$	Other	\$	Did you transfer funds from an IRA directly to a			d.			
Medical miles	:	@ 20¢		charity? Yes Charitable mileage	No		\$			
		s paid for full or partia siness use of the hom		Casualty and The	eft Losses					
State withhold	ling		Reported on W-2			cted damage or loss				
State estimate	d taxes—paid in 20)19	\$	preparer. Yes	y-deciared disast No	er area, provide deta	ills to your tax			
Real estate tax	residence		\$	1 1	Miscellaneous Itemized Deductions. Miscellaneous itemized					
Real estate tax	-other		\$		deductions subject to the 2% AGI limitation are no longer deductible					
Personal property taxes			\$		on the federal return. However, these expenses may still be deductible on your state return. For use of home, auto mileage, or other job-related					
Property tax refund—received in 2019			\$()	expenses, provide	e any expenses					
Foreign tax paid \$			\$	reimbursed by your employer? Yes No						
Other			\$	Dues	\$	Subscriptions	\$			
Other		\$	Investment	\$	Supplies	\$				
Other		\$	expenses							
Balance paid in 2019 from prior year state returns			Job education	\$	Tax prep fees	\$				
(do not includ	e interest or penalt	ies)	\$	Job seeking	\$	Tools	\$			
Did you keep receipts for sales tax paid during 2019? Did you purchase a car, plane, boat, or home in 2019?		Yes No	Legal fees	\$	Uniforms	\$				
		Yes No	Licenses	\$	Union dues	\$				
Sales tax paid \$ Purchase paid \$ Date				Safety equipment \$ Other \$						
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 2% o income limit.							
Main home	\$	Equity loan	\$	Gambling losses	\$	Federal estate tax on IRD	\$			
Second home	\$	Equity loan	\$	Impairment-	\$	Loss from box 2,	\$			
Points	\$	Investment interest	\$	related expenses	Ψ	K-1, Form 1065B	4			
Did you pay a	mortgage insuran	ce premium when you	ı purchased your l		Date	•	•			
	1 4		· ·	<u> </u>						

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. Self-employed health insurance deduction. 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. \$ Tuition and fees deduction. Qualified tuition and fees if not claiming education credits. Income limits apply. Moving expenses. 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						
Installment	Date paid	Federal	Date paid	State		
First		\$		\$		
Second		\$		\$		
Third		\$		\$		
Fourth		\$		\$		
Amount applied from 2018 overpayment?		\$		\$		
Total		\$		\$		

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		
	Spouse	

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.