

Willie Hope CPA, LLC
PERSONAL TAX ORGANIZER
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Personal Information (only complete if a new client or information has changed)

Name					Spouse's Name				
SSN					SSN				
Date of Birth					Date of Birth				
Occupation					Occupation				
Mark all that apply:	Divorced	Legally Separated	Legally Blind	Disabled	Mark all that apply:	Divorced	Legally Separated	Legally Blind	Disabled
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Street Address									
City				State	Zip Code				
Home Phone					Cell Phone				
Filing Status									

Dependents

Name	SSN	Date of Birth	Relationship	Number of Months lived with you during tax year	Can someone else claim this dependent?

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Income

List W-2 information. Please be sure to include the W-2.

You		Spouse	
1.		1.	
2.		2.	
3.		3.	
4.		4.	
5.		5.	

Did you receive interest income during the tax year? <i>If so, please include the 1099-INT.</i>	
Did you receive dividend income during the tax year? <i>If so, please include the 1099-DIV.</i>	
Did you sell any investments during this tax year? <i>If so, please include any statements received from your investment company.</i>	
Did you receive a refund for taxes paid from a state government? <i>If so, please include the 1099-G.</i>	
Did you receive alimony during the tax year? <i>If so, how much?</i>	
Did you receive Unemployment Compensation? <i>If so, please include the 1099-G.</i>	
Did you receive Social Security Benefits? <i>If so, please include the 1099-SSA.</i>	
Did you receive retirement income or take any distributions from your retirement account? <i>If so, please include the 1099-R.</i>	
Did you have business income from a Sole Proprietorship? <i>If so, please include the 1099-NEC. Also, please list all other income not reported on the 1099-NEC and expenses related to the business.</i>	
Were you a shareholder or partner in a Partnership, S-Corporation or LLC? <i>If so, please include Schedule K-1 from the business. If you don't have a Schedule K-1, ask your business accountant.</i>	
Did you receive income from the rental of real estate during the tax year? <i>If so, please provide a schedule with all rental income and expenses.</i>	

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Deductions

Did you pay any medical expenses during the tax year?
*If so, please provide a list of those expenses and include them in the package. Please note, that only medical expenses greater than 7.5% of your Adjusted Gross Income (AGI) are deductible. Example: If your AGI is \$50,000, then only the portion of total medical expenses exceeding \$3,750 (\$50,000 * 7.5%) will be deductible.*

Do you own your principal residence?
If not, please disregard questions 1 and 2

1. Do you still have a mortgage on the residence?
If so, please include the IRS Form 1098 (Mortgage Interest Statement).

2. Depending on the status of the mortgage, the property taxes paid will be on the Mortgage Interest Statement. If not, please include the tax billing statement from the local government taxing agency. You may also present cancelled checks or some other proof of payment.

Did you donate any cash or other personal property to a 501(c)(3) organization?
If so, please provide the following information:

Description of Gift	Donee	Value of Gift	Date Given
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

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Other Items

Did you pay for childcare during the tax year? <i>If so, please provide the following information:</i>			
Child Care Provider	Provider ID (EIN or SSN)	Provider Address	Amount paid
1.			
2.			
3.			
4.			
Did you have interest on student loans paid during the tax year? <i>If so, please include the IRS Form 1098-E.</i>			
Did you have any higher education expenses for the tax year? <i>If so, please include the IRS Form 1098-T (Tuition Statement)</i>			
Note: The items included on this organizer are generally taken by the average taxpayer. There may be other items in which you are entitled to or income that must be included. If you think that you have any income, deduction or credit that you feel you're entitled to, that is not included here, please bring it our attention.			