ORGANIZER Page 1 Tax Organizer US **2018** 1040 **Tax Return Appointment BROWN FINANCIAL LLC PO BOX 390** Date: **HOPE NJ 07844** Time: Telephone number: 908-459-8518 Location: Fax number: 973-333-4249 E-mail address: emily@brownfinancialnj.com This tax organizer will assist you in gathering information necessary for the preparation of your 2018 tax return. Please enter all pertinent 2018 information. NOTE: If you claim the earned income credit, please provide proof that your child is a resident of the United States. This proof is typically in the form of: school records or statement, landlord or property management statement, health care provider statement, medical records, child care provider records, placement agency statement, social service records or statement, place of worship, Indian tribal office statement, or employer statement. NOTE: If your child is disabled, please provide one of the following forms of proof of disability: doctor statement, other health care provider statement, or social services agency or program statement. CLIENT INFORMATION **Taxpayer** First name and initial.... Last name..... Title/suffix...... Social security number... Occupation..... Date of birth (m/d/y) . . . . Date of death (m/d/y) . . . . 1=blind..... Work phone . . . . . . . . . . . . . Work extension..... Cell phone ..... E-mail address . . . . . . . . In care of . . . . . . . Street address..... Apartment number. Address City..... ZIP code..... **DEPENDENTS** Dependent No. Dependent No. First name . . . . . . . . . . . . . . Last name..... Title/suffix....... Date of birth (m/d/y) . . . . Date of death (m/d/y) . . . Date of adoption (m/d/y). Social security number... Relationship..... Months lived at home . . . . Dependent No. Dependent No. First name ..... Last name...... Title/suffix..... Date of birth (m/d/y) . . . . Date of death (m/d/y) . . .

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ORGANIZER Page 3 US **Tax Organizer** 2018 1040 **MISCELLANEOUS INCOME** Taxpayer: Alimony received..... Spouse: Alimony received ..... Other: RETIREMENT PLAN CONTRIBUTIONS 2018 Amount 2017 Amount Taxpayer: Traditional IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)..... Spouse: Traditional IRA contributions (1=maximum)..... Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum)..... OTHER GOVERNMENT FORMS - DEDUCTIONS Form 1098-E - Student loan interest ..... Attach Forms 1098 Form 1098-T - Tuition and related expenses..... AFFORDABLE CARE ACT Form 1095-A - Health Insurance Marketplace Statement..... **Attach Forms 1095** Form 1095-C - Employer-Provided Health Insurance Offer and Coverage. . . . . **ADJUSTMENTS TO INCOME** Taxpayer: Self-employed health insurance premiums..... Educator expenses..... Other adjustments to income: Spouse: Self-employed health insurance premiums..... Educator expenses..... Other adjustments to income: Alimony paid - Recipient name & SSN ..... **MEDICAL AND DENTAL EXPENSES** Prescription medicines and drugs..... Doctors, dentists and nurses ..... Hospitals and nursing homes..... Insurance premiums..... Long-term care premiums - taxpayer..... Long-term care premiums - spouse..... Other: **TAXES PAID** State income taxes - 1/18 payment on 2017 state estimate.....

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Page 5 ORGANIZER **Miscellaneous Questions 2018** 1040 US If any of the following items pertain to you or your spouse for 2018, please check the appropriate box and provide additional information if necessary. PERSONAL INFORMATION YES NO Did your marital status change during the year? Did your address change during the year? Could you be claimed as a dependent on another person's tax return for 2018? DEPENDENTS Were there any changes in dependents? Were any of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 years or older if student) at the end of 2018? Did you have any children under age 19 or full-time students under age 24 at the end of 2018, with interest and dividend income in excess of \$1,050, or total investment income in excess of \$2,100? **HEALTH CARE COVERAGE** Did you and your dependents have health care coverage for the full-year? Did you receive any of the following IRS documents? Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) If so, please attach. If you or your dependents did not have health care coverage during the year, do you fall into one of the following exemptions categories: Indian tribe membership, health care sharing ministry membership, religious sect membership, incarceration, general hardship or unable to renew existing coverage? If you received an exemption certificate, please INCOME Did you receive unreported tip income of \$20 or more in any month? Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? Did you receive any disability income? Did you have any foreign income or pay any foreign taxes? PURCHASES, SALES AND DEBT Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use? Did you buy or sell any stocks, bonds or other investment property in 2018? Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? Did you have any debts cancelled or forgiven? Does anyone owe you money which has become uncollectible?

ORGANIZER Page 6 **Miscellaneous Questions (continued) 2018** 1040 US If any of the following items pertain to you or your spouse for 2018, please check the appropriate box and provide additional information if necessary. RETIREMENT PLANS YES NO Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Did you transfer or rollover any amount from one retirement plan to another retirement plan? **EDUCATION** Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocátional school? ITEMIZED DEDUCTIONS Did you incur a loss because of damaged or stolen property? Did you work out of town for part of the year? Did you use your car on the job (other than to and from work)? **ESTIMATED TAXES** Did you apply an overpayment of 2017 taxes to your 2018 estimated tax (instead of being refunded)? If you have an overpayment of 2018 taxes, do you want the excess applied to your 2019 estimated tax (instead of being Do you expect your 2019 taxable income and withholdings to be different from 2018? MISCELLANEOUS Do you want to allocate \$3 to the Presidential Election Campaign Fund? Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? May the IRS discuss your tax return with your preparer? Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

Page 7 ORGANIZER **Miscellaneous Questions (continued)** US 2018 1040 If any of the following items pertain to you or your spouse for 2018, please check the appropriate box and provide additional information if necessary. **MISCELLANEOUS (continued)** YES NO Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? Was your home rented out or used for business? Did you have a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Medicare Advantage MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy? Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account? Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station? Did you engage the services of any household employees? Were you notified or audited by either the Internal Revenue Service or the State taxing agency? Did you or your spouse make any gifts to an individual that total more than \$15,000, or any gifts to a trust? Did your bank account information change within the last twelve months?

	1040	US	Rental & Royalty Income	(Schedule E)	No.	18
	Please e	nter all per	tinent 2018 amounts. Last year's am	nounts are provided for	your reference	•
GEN	NERAL IN	FORMAT	TON	2018 Amount	<b>2017 Am</b> o	ount
Descri	iption of prope	erty [			Type of Pro	nerty
Street	address					
City					1 = Single Family R 2 = Multi-Family Re	sidence
State .					3 = Vacation/Short- 4 = Commercial	-Term Rental
	ode	F			5 = Land	
Type of	of property (se	ee table)			6 = Royalties 7 = Self-Rental	
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1=nonpa	alified joint ven assive activity,		1=single n	tment		
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ii requ	airea to ille Fo	rm(s) 1099, a	id you or will you file all required Form(s) 109	9: T=yes, 2=no		
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018	1040	US	Rental & Royalty Income	e (Sch. E) (cont.)	No.	18 p2
Plea	ase enter a expense co	ll pertinent lumn shou	2018 amounts. Last year's amount ld only be used for vacation homes	ts are provided for your or less than 100% tena	reference. The intoccupied ren	ndirect tals.
GEN	NERAL IN	IFORMA1	TION			
OIL	AND GA	S		2018 Amount	2017 Amo	ount
Cost of Perce State	depletion ntage depletion cost depletion	on rate or amo	ount			
VAC	CATION F	IOME				
Numb Numb	er of days pe er of days ow	rsonal use ned (if option	al method elected)			
IND	IRECT EX	KPENSES				
			ated to operating or maintaining the dwelling surance, and utilities.	unit.		
Assoc Auto a Clean Comm Garde Insura Legal Licens Manag Misce Mortga Qualif	riation dues and travel (no ing and maint nissions and profession ses and perm gement fees . Illaneous age interest ( ied mortgage	onal fees	ewhere). , etc.).			
Other Painti Pest o	interest (not ng and decora control	entered elsew ating	/here)			
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Wages Other:		S				
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