# 2015 TAX CLIENT ORGANIZER

**NEW CLIENTS:** Please provide as much information as possible, as requested on this form.
**RETURNING CLIENTS:** We already have your correct Social Security Number and Date of Birth from prior years. Please provide all other information requested on this form. Thank you.

| Name(s) – Taxpayer (and Spouse) | Social Security # | Date of Birth | Occupation | Email |
|---|---|---|---|---|
| | | | | |
| | | | | |
| **Address** | | | | New address in 2013? Yes/No |
| **City** | **State** | **Zip** | | **Home Ph:**<br>**Cell Ph:** |

Filing Status: ☐Single ☐Married Joint ☐Married Separate ☐Head of Household ☐Qualifying Widow(er) with Dependent Child

**EXEMPTION INFORMATION:** <u>If you can be claimed on someone else's return, check here</u> ☐

| Dependents Full Name | Date of Birth | Soc. Security # | Relationship | Live with you? | # of Months | Day Care? | College Student ? | Claim Yes or No |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |

Note: If you are claiming a Dependent that does not live with you for the majority of the year, you will need to have the Custodial Parent complete **IRS Form 8332**. This authorization form is a Release of Exemption for Child. Your Tax Preparer can provide the blank form and we can mail it to the IRS.

## INCOME TAX PREPARATION And/Or BOOKKEEPING AGREEMENT -- IMPORTANT

This confirms the Terms and Objectives of our engagement, and the nature and limitations of the Income Tax or Bookkeeping Services that Michelle Radcliffe, or other Representative/Tomah Tax Station will provide to you.
* We will prepare your Federal and State Income Tax Returns and/or provide Bookkeeping services from the information you furnish to us. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of this information.
* The Internal Revenue Code requires that you have documentation for all of your deductions, and your signature indicates your compliance with those requirements. You have the final responsibility for the handling of each item on the return and the overall correctness of the return.
* Your Tax returns are, of course, subject to review by the taxing authorities. It is your responsibility to be able to provide all and any records supporting the information on your Tax return, for generally up to 7 years. Billing for all services regarding IRS resolution will be based on the nature of services performed at that time.
* Your payment is for Tax services provided and is due at the time of completion, and at the time the Return is picked up by client or representative of client. Fees are calculated based on the number of Forms completed, taking into account the amount of time spent by the individual(s) involved, any special level of expertise required, and the size and scope of matters involved. Electronic Filing of a Tax return is not billed separately if we prepare the Tax return.***<u>If the above fairly sets forth your understanding of our service arrangement, please sign this Agreement.</u>***

**The Information and documents that I have provided to Tomah Tax Station for the preparation of my 2015 Federal and State Tax returns are true and correct, to the best of my knowledge.**

Taxpayer___________________________________ Spouse_________________________________ Date___________

# 2015 TAX QUESTIONS

***For each item below, please check Yes or No, then fill in Blank or circle the items that apply to your situation.***

| Yes | No | **At any time during 2015 did you (or your Spouse) receive income from the following sources:** |
|---|---|---|
| | | 1. Wages? Tips? If Tips are not reported on W-2, provide amount $___________________... **Provide all W-2s.** |
| | | 2. Interest or Dividends Income? …**Provide 1099-Ints & 1099-Divs.** |
| | | 3. Social Security or Railroad Retirement Income? …**Provide 1099-SSAs.** |
| | | 4. Sales of stock, mutual funds, bonds or other non-business assets? …**Provide 1099-Bs and cost basis information.** |
| | | 5. Distributions from Pensions, IRAs or Annuities? …**Provide 1099-Rs.** |
| | | 6. Unemployment Compensation for 2015? …**Provide 1099-Gs.** |
| | | 7. Did you **Receive Alimony? …** If so, how much? $__________________/year. |
| | | 8. Income from a Partnership, S-corporation, Estate of Trust? …**Provide Form K-1s.** |
| | | 9. Do you operate a business? Do you conduct this business from an Office in your Home? **Yes / No** (we can provide OIH worksheet) |
| | | 10. If you operate a Farm or Business, have you completed an **Income & Expense Worksheet** with Yearly Totals? (we can provide worksheet) |
| | | 11. If you receive Rental income, have you completed an **Income & Expense Worksheet** for all Rentals you own? (we can provide worksheet) |
| | | 12. Gambling winnings? …**Provide W-2Gs**. Do you have a detail of all winnings and losses? **Yes / No** |
| | | 13. Do you receive royalties from books, patents, etc.? …**Provide 1099-Miscs.** |
| | | 14. Miscellaneous income from prizes, jury duty, cancellation of debt, hobby income or any other income? …**Provide 1099-Miscs**. |
| | | 15. Sale, foreclosure or abandonment of your personal residence, vacation house or rental or commercial property? …**Provide 1099s**. |
| | | 16**. State Taxable Refund** on your 2014 Return? If you are a Returning Client, our system keeps track of that for you, if taxable in 2015. |
| | | 17. If you have Dependent Children, do you receive **Child Support** or other non-taxable benefits? Usually only need this for purposes of calculating WI Homestead Credit. Otherwise, Child Support is not taxable income. $____________________**Child Support collected for Year**. |

| Yes | No | **At Any Time During 2015 Did You (or your Spouse)?:** |
|---|---|---|
| | | 1. **Pay Alimony?** …Provide amount and Social Security # of recipient. $____________/yr. SS# 0f Spouse________-____ -____________ |
| | | 2. Have a mortgage on first or second home? …**Provide Form 1098 Mortgage Interest** statements. |
| | | 3. Refinance your home or take out a home equity loan? …**Provide statements. Additional Form 1098s.** |
| | | 4. **Pay Real Estate Taxes** on your personal or vacation house or land?... **Provide Real Estate Tax Statements for amounts paid in 2015.** |
| | | 5**. Pay medical expenses**, pay after tax payments for health insurance, or qualified long-term care insurance? For Schedule A. |
| | | 6. Make **Contributions** to charitable organizations that you have receipts for? (Church, schools, Scouts, etc.) For Schedule A. |
| | | 7. Suffer a loss as a result of a casualty (fire, theft or natural disaster)? $_______________ |
| | | 8. Incur any out-of-pocket expenses as required by your employer, or use your personal vehicle in conjunction with your job? $__________ |
| | | 9. Move to be closer to a new job, if you were 50 or more miles away from your job prior to your move? |
| | | 10. Have any household employees that you paid during 2015? Amount paid $____________ (does not include weekend-type babysitters) |
| | | 11. Contribute to an IRA, SEP, Keough, Roth or Simple retirement plan on your own? (not 401k or 403b plan) |
| | | 12. Pay for **Child or Dependent Care**? /…**Provide sheet with name, address, SS or EIN#, and amount paid for each child.** Preschools, too. |
| | | 13. Have College education expenses for yourself, spouse or your dependents? **Provide Form 1098T** or student college statement. |
| | | 14. **Pay Interest on Higher Education Loans**? …**Provide Interest paid amount** $__________________ |
| | | 15**. Pay** for any **Teacher/Educator expenses** for your classroom books or supplies?….Amount $____________. |
| | | 16. Cash in any US Bonds to pay for college education expense for yourself, spouse or dependents? |
| | | 17**. Are you claimed as a Dependent on Anyone Else's Tax Return?** Yes/No (If you are age 18-24 and college student, you most likely are a dependent) |
| | | 18. Have **any** Births, Deaths, Marriage, or Divorce in 2015? |
| | | 19. Make any **Health Savings Account contributions or distributions**? **Provide HSA forms.** |
| | | 20. Have distributions from qualified tuition savings plans? **Provide 1099-Qs.** |
| | | 21. Receive payments from a Long Term Care contract? **Provide 1099-LTCs**. |
| | | 22. Use a vehicle in your business? Do you have written records to validate business use? Yes / No. |
| | | 23**. Purchase/or Sell** a home in 2015? **Provide Closing Statement**. |
| | | 24. Did you have Health Insurance through **ObamaCare**?..If so, Did you bring in Form 1095-A sent to you from the **Insurance Marketplace?** |
| | | 25. Pay Federal and/or State Quarterly Estimated Tax Pymts for 2015? **Provide sheet with amounts paid and when.** |
| | | 26. **PAY RENT** in 2015? $____________ **Heat included?...** Yes/No….. **Provide Rent Certificate for Homestead Credit if income <$24,680.** |
| | | 27. Purchase any products Out of State or on the Internet, for use in WI that you did not pay Sales Tax on? …$______________ |
| | | 28. If you get a Refund, **do you want Direct Deposit**? …../..**Provide a Cancelled Check or a Deposit slip**. ***Or Fill in Below:*** |

*Name of Bank*_____________________ *Routing #*_______________ *Checking Acct#* _____________*or Savings Acct* ________________