

## General Questions

ORG3

<b>PERSONAL INFORMATION</b>		
	Yes	No
<b>1</b> Did your marital status change during 2019? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , explain .....		
<b>2</b> Do you want to allow your tax preparer to discuss this year's return with the IRS? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>no</b> , enter another person (if desired) to be allowed to discuss this return with the IRS.		
<b>Caution:</b> Review any transferred information for accuracy.		
Designee's Name .....	►	
Phone Number .....	►	
Personal Identification Number (5 digit PIN).....	►	
<b>3</b> Do you or your spouse plan to retire in 2020 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>4</b> Were you or your spouse permanently and totally disabled in 2019 ?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>5</b> Enter date of death for taxpayer or spouse (if during 2019 or 2020 ): Taxpayer: .....		Spouse: .....
<b>6</b> Were you or your spouse a member of the U.S. Armed Forces during 2019 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEPENDENT INFORMATION</b>		
	Yes	No
<b>7a</b> Do you have dependents who must file? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> If <b>yes</b> , do you want us to prepare the return(s)?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>8a</b> Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> If <b>yes</b> , do you want to include your child's income on your return? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>9</b> Are any of your dependents <b>not</b> U.S. citizens or residents?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>10</b> Did you provide over half the support for any other person during 2019? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>11</b> Did you incur adoption expenses during 2019? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>IRA, PENSION AND EDUCATION SAVINGS PLANS</b>		
	Yes	No
<b>12</b> Did you receive payments from a pension or profit-sharing plan?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>13</b> Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>14a</b> Did you convert all or part of a regular IRA into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> Did you roll over all or part of a qualified plan into a Roth IRA? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>15</b> Did you contribute to a Coverdell Education Savings Account?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>ITEMS RELATED TO INCOME/LOSSES</b>		
	Yes	No
<b>16</b> Did you receive any disability payments in 2019 ?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>17</b> Did you receive tip income <b>not</b> reported to your employer? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>18a</b> Did you buy, sell, refinance, or abandon a principal residence or other real property in 2019 ? (Attach copies of any escrow statements or Forms 1099.).....	<input type="checkbox"/>	<input type="checkbox"/>
<b>b</b> If you sold or abandoned a home, did you claim the First-Time Homebuyer Credit when you purchased the home? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>c</b> Are you planning to purchase a home soon?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>19</b> Did you incur any casualty or theft losses during 2019 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
<b>20</b> Did you incur any non-business bad debts?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>PRIOR YEAR TAX RETURNS</b>		
	Yes	No
<b>21</b> Were you notified by the Internal Revenue Service or state taxing authority of changes to a prior year's return? .....	<input type="checkbox"/>	<input type="checkbox"/>
If <b>yes</b> , enclose agent's report or notice of change.		
<b>22</b> Were there changes to a prior year's income, deductions, credits, etc which would require filing an amended return?.....	<input type="checkbox"/>	<input type="checkbox"/>

## General Questions (continued)

ORG3

### FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

	Yes	No
23 Did you have foreign income or pay any foreign taxes in 2019 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
24a At any time during 2019 , did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?.....	<input type="checkbox"/>	<input type="checkbox"/>
b Did the aggregate value of all your foreign accounts exceed \$10,000 at any time during 2019 ? Report all interest income on Org 11 .....	<input type="checkbox"/>	<input type="checkbox"/>
25 Were you the grantor of or transferor to a foreign trust which existed during the tax year, whether or not you have any beneficial interest in the trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
26 Did you at any time during 2019 , have an interest in or any authority over any foreign accounts or assets (i.e. stocks, bonds, mutual funds, partnership interests, etc.) held in foreign financial institutions that exceeded \$50,000 in value at any time during the year? .....	<input type="checkbox"/>	<input type="checkbox"/>

### HEALTH AND LIFE INSURANCE

	Yes	No
27 Did you receive Form 1095-A (Health Coverage)? If so, please attach.....	<input type="checkbox"/>	<input type="checkbox"/>
28a Did you or your spouse have self-employed health insurance? .....	<input type="checkbox"/>	<input type="checkbox"/>
b If you or your spouse are self-employed, are either of you eligible to participate in an employer's health plan at another job?.....	<input type="checkbox"/>	<input type="checkbox"/>
29 Did your employer pay premiums on life insurance in excess of \$50,000 where the proceeds are payable to beneficiaries named by you? .....	<input type="checkbox"/>	<input type="checkbox"/>
30 Did you contribute to or receive distributions from a Health Savings Account (HSA)? .....	<input type="checkbox"/>	<input type="checkbox"/>

### MISCELLANEOUS

	Yes	No
31 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2019 ? If yes, please attach details .....	<input type="checkbox"/>	<input type="checkbox"/>
32 Did you start paying mortgage insurance premiums in 2019 ? If yes, please attach details .....	<input type="checkbox"/>	<input type="checkbox"/>
33 Did you purchase a motor vehicle or boat during 2019 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, attach documentation showing sales tax paid.		
34 Did you purchase an energy efficient vehicle in 2019 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, enter year, make, model, and date purchased:		
35 Did you donate a vehicle in 2019 ? If yes, attach Form 1098C .....	<input type="checkbox"/>	<input type="checkbox"/>
36 What was the sales tax rate in your locality in 2019 ? _____ %      State ID .....		
37 Did you or your spouse make gifts of over \$15,000 to an individual or contribute to a prepaid tuition plan?.....	<input type="checkbox"/>	<input type="checkbox"/>
38 Did you make gifts to a trust? .....	<input type="checkbox"/>	<input type="checkbox"/>
39 If there were dues paid to an association, was any portion required to be non-deductible due to political lobbying by the association? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach details.		
40 Did you or your spouse participate in a medical savings account in 2019 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach Form 1099-SA (Distributions from an HSA, Archer MSA or Medicare+Choice MSA.)		
41 Did you make a loan at an interest rate below market rate? .....	<input type="checkbox"/>	<input type="checkbox"/>
42 Did you pay any individual for domestic services in 2019 ? .....	<input type="checkbox"/>	<input type="checkbox"/>
43 Did you pay interest on a student loan for yourself, your spouse, or your dependents?.....	<input type="checkbox"/>	<input type="checkbox"/>
44 Did you, your spouse, or your dependents attend post-secondary school in 2019 ?.....	<input type="checkbox"/>	<input type="checkbox"/>
45 Did a lender cancel any of your debt in 2019 ? (Attach any Forms 1099-A or 1099-C) .....	<input type="checkbox"/>	<input type="checkbox"/>
46 Did you receive any income not included in this Tax Organizer? .....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please attach information.		
47 At any time during 2019, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ..	<input type="checkbox"/>	<input type="checkbox"/>

### ELECTRONIC FILING AND DIRECT DEPOSIT OF REFUND

	Yes	No
48 If your tax return is eligible for Electronic Filing, would you like to file electronically? .....	<input type="checkbox"/>	<input type="checkbox"/>
49 The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts. If you receive a refund, would you like direct deposit?.....	<input type="checkbox"/>	<input type="checkbox"/>
<b>Caution:</b> Review transferred information for accuracy.		
50 If yes, please provide the following information:		
a Name of your financial institution .....		
b Routing Transit Number (must begin with 01 through 12 or 21 through 32) .....		
c Account number .....		
d What type of account is this? .....	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Please attach a <b>voided</b> check (not a deposit slip) if your bank account information has changed.		