

Jennifer A. Jones, CPA, Ltd.
10615 Judicial Drive, Suite 701
Fairfax, Virginia 22030
703-352-1587
www.jajonescpa.com

Enclosed you will find your 2017 Tax Organizer to assist you in gathering the information and documents necessary for the preparation of your 2017 income tax returns. Your careful completion and timely return of the Tax Organizer and documentation will enable us to accurately and efficiently prepare your tax returns.

This Tax Organizer is prepared based on your prior year return. If your situation has changed and the Topical Index refers you to a sheet that you do not have, you can **access blank forms on our website at www.jajonescpa.com, or by calling or emailing your request.**

As you complete your Tax Organizer, you may find areas in which you need to enter a total. In these cases, it is best to keep a list which indicates the date, check number and/or other description, and amount of those items which total to that entry. This list should become a permanent part of your tax records and in the event your return is examined, it will simplify the gathering of all essential documents. If you are unsure of how to enter information in the Tax Organizer, it is best to provide us with a written description of the transaction(s) and include all pertinent documents. **Please be sure to return the Tax Organizer, even if not completed, and your signed Engagement Letter to us with your tax documents. Please also indicate your preference for e-filing, and sign the Opt-Out statement if you want to file paper returns.**

Although we may not require the physical inspection of your receipts and other documents supporting income and deductions, you must retain these records in your files. Any documents you send to us will be returned to you, however, **we will retain the Tax Organizer itself.** We may copy some of your documents for our files, but we do not maintain all the records that may be needed to support your tax return. Also, because of limited file space, we routinely destroy certain documents in our files after three years. You should retain your records for a longer period of time.

We are required to e-file your Federal and state income tax returns. Only in those cases where your return cannot be electronically filed, or you and your spouse, if married, have signed the Taxpayer E-Filing Opt-Out Election Statement found in the Tax Organizer is a paper return permitted. If you have an email address, we will email your returns to you as a PDF for your review. You will need to print and sign the appropriate signature forms and return them to us before we can e-file the returns. If you do not have an email address, or cannot print pages from a PDF, we will need to discuss procedures for you to obtain the returns, review them and return the signature pages to us.

If you are unable to obtain all of the information necessary to prepare your returns, or you are unable to send the Tax Organizer to us by March 25th, please let us know. Applications for extensions of time to file your federal and state income tax returns will be required. The extensions provide additional time to file the returns, but they do not provide additional time to pay the tax. Therefore, in order to prepare valid extension applications and avoid penalties, it is necessary to determine what your tax liabilities are and any balances due must be paid with the applications.

During the holiday season more than ever, our thoughts turn gratefully to those who have made our progress possible. In this spirit we say, simply but sincerely, thank you. We look forward to working with you again this tax season.

Jennifer A. Jones, CPA, Ltd.

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ENGAGEMENT LETTER

PLEASE SIGN AND RETURN WITH YOUR TAX ORGANIZER

In accordance with standards established by the American Institute of Certified Public Accountants to ensure a mutual understanding, it is necessary to set forth our understanding of the terms and objectives of our relationship, and to clarify the nature and extent of the tax services to be provided.

Engagement Objective and Scope

We will prepare your 2017 federal and resident state income tax returns from information that you will furnish to us. Should your Organizer indicate a gift tax return filing requirement, we will prepare the gift tax return(s). We will prepare your non-resident state income tax returns based upon your filing requirements as reflected in your income tax returns for last year. If we determine that your filing requirements have changed, you will be notified. This engagement pertains only to the 2017 tax year. Our responsibilities do not include preparation of any other tax returns that may be due to any taxing authority.

We will not prepare any tax returns except those identified above, without your express consent, and our consent to do so. We will prepare your tax returns based upon information and representations that you provide to us. We have not been engaged to and will not prepare financial statements. We will not audit or otherwise verify the data you submit to us, although we may ask you to clarify certain information.

We will prepare the above referenced tax returns solely for filing with the Internal Revenue Service (IRS) and state and local tax authorities as identified above. Our work is not intended to benefit or influence any third party, either to obtain credit or for any other purpose.

Our engagement in connection with the preparation of your income tax returns does not include any procedures guaranteed or designed to discover errors, misrepresentations, fraud, theft, illegal acts, defalcations or other irregularities, should any exist, and you agree that we have no responsibility to do so. Therefore, our engagement cannot be relied upon to disclose such matters. However, we will inform you of any such acts that come to our attention, unless they are clearly inconsequential. If we discover information that affects your prior-year tax returns, we will make you aware of the facts. However, we cannot be responsible for identifying all items that may affect prior-year returns. If you become aware of such information during the year, please contact us to discuss the best resolution of the issue.

In preparing your tax return, a staff person will assemble the initial data from the documents you provide to us. Other staff personnel may contact you to obtain additional information.

This engagement is limited to the professional services outlined above.

CPA Firm Responsibilities

Unless otherwise noted, we will perform our services in accordance with the Statements on Standards for Tax Services issued by the American Institute of Certified Public Accountants and U.S. Treasury Department Circular 230. It is our duty to perform services with the same standard of care that a reasonable tax preparer would exercise in this type of engagement.

We will prepare your tax returns based upon your filing status as reflected in your income tax returns for last year. If your filing status has changed, you wish to change your filing status, or you have questions about your filing status, please indicate this in your Organizer.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

Bookkeeping assistance: Should you provide us a copy of the data-file for an existing QuickBooks or other computerized ledger, we will review the file you maintain, make inquiries and/or recommendations for any issue(s) that are discovered or has/have been indicated as existing. These inquiries will be to determine the proper handling of an item, and the recommendations may include correcting journal entries, reclassification of entries, suggested training, or changes in QuickBooks lists, preferences, or other features. Depending on the agreed upon procedure, we will provide, execute and/or implement the recommendations. To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for the preparation of the returns and billed at our hourly rates.

These services will be performed in accordance with the AICPA Code of Professional Conduct. Additional charges will apply for such services.

Estimated tax payments: You may be required to make quarterly estimated tax payments. We will calculate these payments for the 2018 tax year based upon the information you provide to prepare your 2017 tax returns and have no obligation to update recommended payments after the engagement is completed. If you ask us to update your estimated tax payments, we will handle that request as a separate engagement.

Tax planning services: Our engagement does not include tax planning services. During the course of preparing the tax returns identified above, we may bring to your attention potential tax savings strategies for you to consider as a possible means of reducing your taxes in subsequent tax years. However, we have no responsibility to do so, and will take no action with respect to such recommendations, as the responsibility for implementation remains with you, the taxpayer. If you ask us to provide tax planning services, or if we customarily provide tax planning, we will handle that as a separate engagement.

Government inquiries: This engagement does not include responding to inquiries by any governmental agency or tax authority. Should you receive an inquiry, you may request that we assist you in responding to such inquiry. Your returns may be selected for examination by the taxing authorities. Any proposed adjustments are subject to certain rights of appeal. If your tax return is selected for examination or audit, you may request that we assist you or represent you. In the event of such examination, audit, inquiry, or proposed adjustment, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Third-party verification requests: We will not respond to any request from banks, mortgage brokers or others for verification of any information reported on these tax returns.

Records and Record Retention: All of your original records that you provide to us to prepare your tax return(s) will be returned to you after our use. A copy of your income tax returns will also be provided to you. If you e-file your returns, this copy will be in PDF format. You may request a hard-copy in addition to the PDF. If you elect not to e-file, a hard-copy will be provided to you. Our working papers, including any copies of your records that we chose to make and the tax organizer that you complete, are our property and will be retained by us in accordance with our established records retention policy. This policy states, in general, that we will retain these working papers for a period of three years. After this period expires, these files may be destroyed. We will provide copies of such documents at our discretion and if compensated for any time and costs associated with the effort.

Client Responsibilities

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will provide you with a Tax Organizer to help you compile and document the information we need to prepare your returns. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed to us all relevant facts affecting the returns. Income from all sources, including those outside the U.S., is required. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information.

Documentation: You are responsible for maintaining adequate documentation to substantiate the accuracy and completeness of your tax returns. You should retain all documents that provide evidence and support for reported income, credits, and deductions on your returns, as required under applicable tax laws and regulations. You are responsible for the adequacy of all information provided in such documents. You represent that you have such documentation and can produce it, if needed, to respond to any audit or inquiry by tax authorities. You agree to hold harmless our firm and its partners, principals, shareholders, officers, directors, members, employees, agents or assigns with respect to any additional tax, penalties, or interest imposed on you by tax authorities resulting from the disallowance of tax deductions due to inadequate documentation. Certain deductions, such as travel and entertainment expenses and expenses for business use of autos, computers, and listed property, require strict documentation. Certain non-cash transactions, such as bartering, require reporting. In preparing your returns, we rely on your representations that we have been informed of all bartering transactions and that you understand and have complied with the documentation requirements for all of your expenses and deductions. If you have any questions about these issues, please contact us.

Personal expenses: You are responsible for ensuring that personal expenses are segregated from business expenses.

State and local filing obligations: You are responsible for determining your tax filing obligations with any state or local tax authorities, including, but not limited to income, franchise, sales, use, business license, business tangible personal property, or unclaimed property taxes. You agree that we have no responsibility to research these obligations or to inform you of them. If upon review of the information you have provided to us, along with information that comes to our attention, we believe you may have additional filing obligations, we will notify you of this responsibility and ask you to contact us. If you ask us to prepare these returns, we will handle that as a separate engagement.

U.S. filing obligations related to foreign financial assets: As part of your filing obligations, you are required to report the maximum value of specified foreign financial assets, which include financial accounts with foreign institutions and certain other foreign non-account investment assets that exceed certain thresholds. You are responsible for informing us of all foreign assets, so we may properly advise you regarding your filing obligations.

These assets include any ownership interests you directly or indirectly hold in businesses located in a foreign country, and any assets or financial accounts located in a foreign country over which you have signature authority. Based on the information you provide, we will inform you of any additional filing requirements, which may include *Form 8938, Statement of Specified Foreign Assets*, and *FinCEN Form 114, Report of Foreign Bank and Financial Accounts*. Failure to file required forms can result in the imposition of both civil and criminal penalties, which may be significant.

Foreign filing obligations: You are responsible for complying with the tax filing requirements of any other country. You acknowledge and agree that we have no responsibility to raise these issues with you and that foreign filing obligations are not within the scope of this engagement.

Gift Tax Returns: Any transfer to an individual, either directly or indirectly, where full consideration (measured in money or money's worth) is not received in return is considered a gift. Under federal tax law, certain gifts are taxable and subject to an annual gift tax exclusion amount. You are responsible for informing us if gift tax returns are required to be filed.

Ultimate responsibility: You have final responsibility for your income tax returns. We will provide you with a copy of your electronic income tax returns and accompanying schedules and statements for review prior to filing with the IRS and state and local tax authorities (as applicable). You agree to review and examine them carefully for accuracy and completeness. The law provides various penalties that may be imposed when taxpayers understate their tax liability. You acknowledge that any such understated tax, and imposed interest and penalties, are your responsibility, and that we have no responsibility in that regard.

You will be required to verify and sign a completed *Form 8879, IRS e-file Signature Authorization*, and any similar state and local equivalent authorization form before your returns can be filed electronically.

In the event that you do not wish to have your income tax returns filed electronically, additional procedures apply and signatures are required in the Organizer in regards to this matter. You will be responsible for reviewing the paper returns for accuracy, signing them, and filing them timely with the tax authorities.

Timing of the Engagement

We expect to begin our services upon receipt of the completed 2017 Tax Organizer and all tax documents requested either in the 2017 Tax Organizer or by our office.

If your return is electronically filed, our services will conclude upon the earlier of: 1) the filing and acceptance of your 2017 tax returns by the appropriate tax authorities, 2) written notification by either party that the engagement is terminated, or 3) one year from the execution date of this Agreement.

If you have the option to file a paper return and choose to do so, our services will conclude upon the earlier of: 1) mailing or delivery to you of your 2017 tax returns for your review and filing with the appropriate tax authorities, 2) written notification by either party that the engagement is terminated, or 3) one year from the execution date of this Agreement.

Extensions of Time to File Tax Returns

It may be necessary for us to apply for an extension of the filing deadline if there are unresolved issues or delays in processing, if we do not receive all of the necessary information needed to prepare the return on a timely basis, or due to staffing availability. Applying for an extension of time to file may extend the time available for a taxing authority to undertake an audit of your return or may extend the statute of limitations. All taxes owed are due by the original filing due date.

Our firm will not file these applications unless we receive your express authorization to do so. In some cases, your signature may be needed on such applications prior to filing or payment of tax due must be enclosed with the application. Failure to timely request an extension of time to file can result in penalties for failure to file tax returns, which accrue from the original due date of the returns, and can be substantial. Failure to pay the taxes due by the original due date will result in the assessment of interest and penalties, which also accrue from the original due date of the returns, and can be substantial.

Disclosure of Tax Return Information

Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution. Disclosure to a third party will not be made without your written consent using a Consent Form provided to you by our firm upon request.

If the tax returns prepared in connection with this engagement are filed using the married filing jointly filing status, both spouses are deemed to be clients of our firm under the terms of this Agreement. You each acknowledge that there is no expectation of privacy from the other concerning our services in connection with this engagement, and we are at liberty to share with either of you, without prior consent of the other, any and all documents and other information concerning the preparation of your returns. You also acknowledge that unless we are notified otherwise in advance and in writing, we may construe an instruction from either of you to be an instruction on your joint behalf. Absent a contrary written instruction in the future, from either or both of you, we will communicate with either or both of you at the address on your 2017 federal return.

Certain communications involving tax advice between you and our firm may be privileged and not subject to disclosure to the IRS. By disclosing the contents of these communications to anyone, or by turning over information about those communications to the government, you may be waiving this privilege. To protect this right to privileged communication, please consult with your attorney prior to disclosing any information about our tax advice. Should you decide that it is appropriate for us to disclose any potentially privileged communications, you agree to provide us written, advance authority to make that disclosure.

Should we receive any request for the disclosure of privileged information from any third party, including a subpoena or IRS summons, if permitted, we will notify you of any requests prior to responding. You may, within the time permitted for our firm to respond to the request, initiate such legal action as you deem appropriate to protect information from discovery. Unless you promptly initiate such action after we notify you at your last known address, we will release the information requested. In the event you direct us not to make the disclosure, you agree to hold us harmless from any expenses incurred in defending the privilege, including, by way of illustration only, our attorney fees, court costs, outside adviser's costs, or penalties or fines imposed as a result of your asserting the privilege or your directions to us to assert the privilege.

In the event we are required to respond to a subpoena, court order or other legal process for the production of documents and/or testimony relative to information we obtained and/or prepared during the course of this engagement, you agree to compensate us at our hourly rates for the time we expend in connection with such response, and to reimburse us for all of our out-of-pocket costs incurred in that regard.

Penalties and Interest Charges

Federal, state, and local tax authorities impose various penalties and interest charges for non-compliance with tax laws and regulations, including, failure to file or late filing of returns, and underpayment of taxes. You, as the taxpayer, remain responsible for the payment of all tax, penalties, and interest charges imposed by tax authorities.

We rely on the accuracy and completeness of the information you provide to us in connection with the preparation of your tax returns. Failure to disclose or inadequate disclosure of income or tax positions may result in the imposition of penalties and interest charges.

The Internal Revenue Code and regulations impose preparation and disclosure standards with noncompliance penalties on both the preparer of a tax return and on the taxpayer. Unless we have a reasonable belief that any tax position in your return will be sustained on its merits, a preparer penalty will be imposed on us unless that position has a reasonable basis and is adequately disclosed in the return. And, while we might be able to avoid a preparer penalty by adequately disclosing a return position, you might not have to disclose the position in order to avoid applicable taxpayer penalties. If we determine that we would be subject to a preparer penalty by delivering your return to you, you agree to either adequately disclose that position on your return or change the position to one that would not subject us to penalty. If you do not choose to change your position or adequately disclose so as to eliminate, in our sole opinion, our exposure to the preparer penalty, we, in our sole discretion and at any time, may withdraw from the engagement without completing or delivering tax returns to you. Such withdrawal will complete our engagement, and you will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenses through the date of our withdrawal.

Professional Fees

Our fees for tax services will be based upon complexity of the work to be performed, our professional time to complete the work, and on the availability, quality and completeness of your records. We also bill for any out-of-pocket expenses incurred on this engagement, including computer processing charges, and delivery charges. Hourly rates vary from \$120 to \$250 per hour depending on the individual providing the services. We reserve the right to increase or decrease our fees based on the value of the services rendered. All invoices are due and payable upon presentation unless you make other agreed upon arrangements. There will be a late charge of \$30 plus 1.5% per month (18% APR) added to all fees paid more than 30 days from the date of billing. Should it become necessary for our firm to incur attorney's or other collection agency fees in order to collect on your unpaid invoice, you will be responsible for reimbursing us for our costs of collection, including attorney fees.

Additional copies of the tax returns will be provided upon request. The fee is \$25 per tax year.

If we elect to terminate our services for non-payment or for any other reason provided for in this letter, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed your return. You will be obligated to compensate us for all time expended, and to reimburse us for all of our out-of-pocket costs incurred on your behalf.

Any litigation arising out of this engagement, except actions by us to enforce payment of our professional invoices, must be filed within one year from the completion of the engagement, notwithstanding any statutory provision to the contrary. In the event of litigation brought against us, any judgment you obtain shall be limited in amount, and shall not exceed the amount of the fee charged by us, and paid by you, for the services set forth in this engagement letter. Our liability for all claims, damages and costs arising from this engagement is limited to the total amount of fees paid to us by you for the services rendered under this agreement.

In the event that we become obligated to pay any judgment or similar award, you agree to pay any amount in settlement, and/or incur any costs as a result of any inaccurate or incomplete information that you provide to us during the course of this engagement, you agree to indemnify us, defend us, and hold us harmless as against such obligations, agreements and/or costs.

This engagement letter is contractual in nature, and includes all of the relevant terms that will govern the engagement for which it has been prepared. The terms of this letter supersede any prior oral or written representations or commitments by or between the parties. Any material changes or additions to the term set forth in this letter will only become effective if evidenced by a written amendment to this letter, signed by all of the parties.

If the tax services and terms outlined are in accordance with your understanding of our engagement, **please sign this letter on the line below designated for your signature and return the original of this executed letter with a completed copy of the enclosed Tax Organizer and your supporting documentation. You should keep a copy of this letter and your completed Tax Organizer for your records.**

If this firm does not receive from you the original of this letter, in fully executed form, but receives from you a completed copy of the enclosed Organizer and/or supporting documentation, then such receipt by this office shall be deemed to evidence your acceptance of all of the terms set forth above. If however, this office receives from you no response to this letter, then this office will not proceed to provide you with any professional services and will not prepare your income tax returns.

Please return the Tax Organizer, even if you did not complete it. It is helpful to us for organizing your information and determining if anything is missing.

We want to express our appreciation for this opportunity to be of service to you.

To:
Jennifer A. Jones, CPA, Ltd.
10615 Judicial Drive, Suite 701
Fairfax, VA 22030
703-352-1587

From:

Name: _____

Street Address: _____

City, State, Zip Code: _____

The foregoing is in accordance with my understanding of your engagement to provide tax services for the 2017 federal, resident state income tax returns. Should it be determined that there are filing requirements for non-resident state returns, Form 709 U.S. Gift Tax Return(s), Form 8938, Statement of Specified Foreign Assets, and/or FinCEN Form 114, Report of Foreign Bank and Financial Accounts, that this engagement will include these filing requirements upon express, mutual agreement. The terms described in this letter are acceptable and are hereby agreed to.

AGREED TO AND ACCEPTED BY:

Jennifer A. Jones, C.P.A.
Jennifer A. Jones, CPA, President
For: Jennifer A. Jones, CPA, Ltd.

(Both spouses must sign for the preparation of a joint return)

Accepted By:

Taxpayer _____ Date _____

Accepted By:

Spouse, if applicable _____ Date _____

2017

1040

US

Miscellaneous Questions

DIRECT DEPOSIT OF TAX REFUNDS OR ELECTRONIC PAYMENT OF TAX DUE

Yes No

- If you have an overpayment of taxes for 2017, do you want your refund directly deposited to one or more financial accounts (checking, savings, and/or retirement)?
- If you have a balance due on your federal or state returns for 2017, do you want to make an electronic payment by having your bank account directly debited on the due date for this balance due?
- If so, has there been a change in the bank name, routing number, account number, type of account since 2016?

OTHER INFORMATION

Yes No

- Did your marital status change during 2017? If so, please indicate the change here.
- Did your address change during 2017? If so, please indicate the change here. If you moved to a different state, please indicate the date your state of residency changed here: _____
- Did your e-mail address or telephone number(s) change since 2016? If so, please indicate the new address or number here.
- Has IRS or your State issued you an Identity Theft PIN? If so, please provide the PIN(s) and a copy of the letter.
- Were there any changes in dependents? If so, please indicate the change here.
- Did you and your dependents have healthcare coverage for the full-year? Please attach Form 1095-A (Health Insurance Marketplace Statement), 1095-B (Health Coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage)
- Did you have an interest in or signature or other authority over any foreign assets or financial accounts in a foreign country, and there was over \$10,000 in the account?
- During 2017, did you or your spouse make any gifts to an individual or a trust, or make contributions to a 529 plan, that total more than \$14,000?

2017	1040	US	Tax Organizer
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E-mail address: jenny@jajonescpa.com

Tax Return Appointment

Date:
Time:
Location:

This tax organizer will assist you in gathering information necessary for the preparation of your 2017 tax return. Please enter all pertinent 2017 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	Spouse
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			
Home phone			
Work phone			
Work extension			
Cell phone			
E-mail address			
Address	In care of		
	Street address		
	Apartment number		
	City		
	State		
	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) . . .			
Date of adoption (m/d/y) . .			
Social security number . . .			
Relationship			
Months lived at home . . .			

Please enter all pertinent 2017 information. If you have attached a government form for an item, check the box and do not enter a 2017 amount.

WAGES, SALARIES AND TIPS

Employer name:

<input type="checkbox"/>	_____

2017 Amount	2016 Amount
Attach Forms W-2	_____

INTEREST INCOME

Payer name:

<input type="checkbox"/>	_____

Attach Forms 1099-INT	_____

DIVIDEND INCOME

Payer name:

<input type="checkbox"/>	_____

Attach Forms 1099-DIV	_____

PENSIONS, IRA AND GAMBLING INCOME

Payer name:

<input type="checkbox"/>	_____

Attach Forms 1099-R & W-2G	_____

Winnings not reported on W-2G.....	_____
Total gambling losses.....	_____

OTHER GOVERNMENT FORMS - INCOME

<input type="checkbox"/>	Form 1099-B - Sales of stock (also include transaction history).....
<input type="checkbox"/>	Form 1099-MISC - Miscellaneous income.....
<input type="checkbox"/>	Form 1099-K - Merchant card and third party network payments.....
<input type="checkbox"/>	Form 1099-S - Sales of real estate (also include closing statements)

Attach Forms 1099	
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<input type="checkbox"/>	Form 1099-G - State tax refunds.....
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Attach Forms 1099	
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Taxpayer:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....
<input type="checkbox"/>	Form 1099-Q (529 Plan).....
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts).....

Attach Forms 1099	
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Spouse:

<input type="checkbox"/>	Form SSA-1099 - Social security benefits.....
<input type="checkbox"/>	Form 1099-G - Unemployment compensation.....
<input type="checkbox"/>	Form 1099-Q (529 Plan).....
<input type="checkbox"/>	Form 1099-QA/5498-QA (ABLE Accounts).....

Attach Forms 1099	
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2017 1040 US Tax Organizer

MISCELLANEOUS INCOME

Taxpayer: Alimony received.....
 Spouse: Alimony received.....
 Other: _____

RETIREMENT PLAN CONTRIBUTIONS

Taxpayer: Traditional IRA contributions (1=maximum).....
 Roth IRA contributions (1=maximum).....
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum).....
 Spouse: Traditional IRA contributions (1=maximum).....
 Roth IRA contributions (1=maximum).....
 Self-employed, SEP, SIMPLE, & qualified plan contributions (1=maximum).....

2017 Amount	2016 Amount

OTHER GOVERNMENT FORMS - DEDUCTIONS

Form 1098-E - Student loan interest.....
 Form 1098-T - Tuition and related expenses.....

Attach Forms 1098	

AFFORDABLE CARE ACT

Form 1095-A - Health Insurance Marketplace Statement.....
 Form 1095-B - Health Coverage.....
 Form 1095-C - Employer-Provided Health Insurance Offer and Coverage.....

Attach Forms 1095	

ADJUSTMENTS TO INCOME

Taxpayer:
 Self-employed health insurance premiums.....
 Educator expenses.....
 Other adjustments to income:

Alimony paid - Recipient name & SSN.....

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.....
 Insurance reimbursement.....
 Out-of-pocket lodging and transportation expenses.....
 Number of medical miles.....
 Other: _____

TAXES PAID

State income taxes - 1/17 payment on 2016 state estimate.....

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