ADVISANT
FINANCIAL

2018 Tax Organizer

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2018 income tax return. The attached worksheet has been included to help in the preparation of your tax return by focusing attention on your particular circumstances.

Please enter your 2018 information in the designated areas on the worksheet. If you need to include additional information, you may use the back of the worksheet or an additional page.

Please provide the following information, if applicable:

- ☐ A copy of your 2017 tax return (if not in our possession).
- ☐ Original Form(s) W-2.
- ☐ Schedule(s) K-1 showing income or loss from partnerships, S corporations or estates or trusts.
- ☐ Copies of other compensation or retirement documentation, such as form 1099-Misc or Form 1099-R.
- ☐ Form(s) 1099 or statements reporting dividend and interest income.
- ☐ Brokerage statements showing transactions for stocks, bonds, etc.
- ☐ Form(s) 1098 reporting interest paid, copies of real estate tax bills and other information relating to real property holdings.
- ☐ Copies of closing statements regarding the sale or purchase of real property.
- ☐ Summary of charitable contributions
- ☐ All other information, notices you received, or any items you have questions about.
- ☐ Have any significant changes taken place since filing in 2017 / other notes?

_____

_____

_____

_____

- ☐ Was your household covered by health insurance throughout all of 2018? YES NO
- ☐ Are you looking to purchase a or sell property (real estate) in the near future? YES NO

Thank you for taking the time to complete this Tax Organizer.

Email: team@advisantfinancial.com
Website: www.advisantfinancial.com

Personal Information

	TAXPAYER	SPOUSE
Last Name:		
First Name:		
Middle initial & suffix:	MI _____ Suffix _____	MI _____ Suffix _____
Social security number:		
Occupation:		
Work phone/extension:		
Cell phone:		
E-mail address:		
Birthdate:	MM/DD/YYYY _____	MM/DD/YYYY _____
Eligible to be claimed as a dependent on another return?	YES NO	YES NO

Street address: _____ Apartment number: _____

City: _____ State: _____ ZIP code: _____

FILING STATUS

1. Single
2. Married filing jointly
3. Married filing separately
   - Check this box if you did not live with spouse at any time during the year ➡
   - Check this box if you are eligible to claim spouse's exemption ➡
   - Check this box if your spouse itemizes deductions ➡
4. Head of household
   - If the qualifying person is a child but not your dependent, enter
   - Child's Name: _____ Child's social security number: _____
5. Qualifying widow(er)
   - Check the box for the year the spouse died 2017 2018

DEPENDENT INFORMATION

Full Name (first name, middle initial, last name, suffix)	Social Security Number / Relationship	**Code / +Months in U.S.	Date of Birth / *Not Citizen	2018 Child Care Expense / 2017 Child Care Expense

For the Dependent Code enter the following: **L = dependent child who lived with you
N = dependent child who didn't live with you due to divorce or separation
O = other dependent
Q = not a dependent (but is a person that qualifies client for the earned income credit and/ or the credit for child and dependent care expenses

+ Enter the number of months dependent lived with you in the U.S. ***** Check box if dependent is not U.S. citizen or resident alien