

TAX ORGANIZER

Enclosed is your Tax Organizer for tax year 2017.

Your Organizer contains several sections that include common expenses and deductions that many taxpayers overlook. Please review these sections carefully. Depending upon your tax bracket, you may save as much as \$35 for each \$100 in deductible expenses you find in your 2017 records.

If our firm prepared your return last year, your prior year amounts are included in the Prior Year Amount column of your Organizer. Use this information to help you remember the types of income and deductions you reported last year.

To complete the Organizer, enter all relevant information in the designated areas on each page. Please add any notes or questions that will help us prepare a complete and accurate return for you and to plan with you how to manage your tax situation in future years.

If you answer 'Yes' to any of the General Business and Investment questions, please provide detailed information with your answer.

We have scheduled your appointment for:

Day:

Date:

Time:

When you arrive for your appointment, please bring your Organizer and any of the following that apply to your tax situation:

- Last year's tax return (if not in our possession)
- Original Form(s) W-2
- Schedule(s) K-1 from partnerships, S-corporations, estates or trusts
- Information about contributions to a pension or other retirement plan if this is the first year you received income from the plan
- Form(s) 1099 or statements reporting dividend, interest, retirement or other income
- Broker statements providing details of capital gains transactions
- Form(s) 1098 and copies of real estate tax bills, etc.
- Legal documents pertaining to the sale or purchase of real property

If you have any questions before your scheduled appointment, please give us a call.

Sincerely,

John W Willyoung
4301 West Cayuga Street
Tampa, FL 33614
(813) 872-0077

Willyoung & Co PA
John W Willyoung
4301 West Cayuga Street
Tampa, FL 33614



Organizer Mailing Slip

General Information

Taxpayer

First Name _____
Middle Initial _____
Last Name _____
Suffix _____
Social Security Number _____
Date of Birth _____
Date of Death _____

Spouse

Check ("X") which phone number to list on return.

Home Phone _____
Work Phone _____
Cell Phone _____
Fax Number _____

Legally Blind _____
Totally Disabled _____
Claimed as a Dependent _____
Presidential Election Fund (\$3) _____

Occupation _____
E-mail address _____
State of Residence as of 12/31 _____
County of Residence as of 12/31 _____
School District as of 12/31 _____
Sales tax rate of locality in 2017 _____ % _____
If Part Year, Period of Residency _____ to _____

_____ % _____
_____ to _____

Additional information is being requested this filing season in an effort to combat stolen-identity tax fraud. Please provide the requested information from the driver's license or state-issued identification card. Providing the information could help process state returns faster.

ID type _____ Driver's license OR State Issued ID _____ Driver's license OR State Issued ID
ID number _____
ID issuing state _____
ID issue date _____
ID expiration date _____

Filing Status

Status on 2016 return :
Status as of 12/31/2017 : 1 Single
Enter ("X") in the box 2 Married filing joint
 3 Married filing separately
(Enter spouse's name and SSN above)
 4 Head of Household Non-dependent name: _____
Non-dependent SSN: _____
 5 Qualifying widow(er) with minor child Year spouse died _____

Taxpayer's Address

Street _____ Apt/Suite : _____
City _____ State _____ Zip Code _____
If address is in a foreign country, enter that country . . . _____
Foreign province/county . . . _____ Foreign postal code _____
If a bona fide resident of a U.S. territory, enter territory . . . _____

Preparer's Information

Preparer's name John W Willyoung
Firm's name Willyoung & Co PA
Street 4301 West Cayuga Street
City Tampa State FL Zip Code 33614