

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



Organizer Mailing Slip

- | | | | |
|--------------------------|--------------------------|----|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 8 | Did you sell any assets using the installment method? |
| <input type="checkbox"/> | <input type="checkbox"/> | 9 | Did you receive proceeds from a prior year installment sale? |
| <input type="checkbox"/> | <input type="checkbox"/> | 10 | Did you purchase a rental property? |
| <input type="checkbox"/> | <input type="checkbox"/> | 11 | Did you exchange any property for other property? |
| <input type="checkbox"/> | <input type="checkbox"/> | 12 | Did you incur a loss because of damaged or stolen property? |
| <input type="checkbox"/> | <input type="checkbox"/> | 13 | Did you purchase a new vehicle, aircraft or boat? |
| <input type="checkbox"/> | <input type="checkbox"/> | 14 | Did any security become worthless during 2019? |
| <input type="checkbox"/> | <input type="checkbox"/> | 15 | Did any debts become uncollectible during 2019? |
| <input type="checkbox"/> | <input type="checkbox"/> | 16 | Did you purchase any items acquired out of state, online or by mail order that did not include sales tax? |

Yes No

Business and Rental Property Income & Deductions

- | | | | |
|--------------------------|--------------------------|----|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1 | If you own rental property, do you qualify as a Real Estate Professional? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2 | Did you start or acquire a new business? |
| <input type="checkbox"/> | <input type="checkbox"/> | 3 | Did you sell any part of an existing business, or sell business assets? |
| <input type="checkbox"/> | <input type="checkbox"/> | 4 | Did you cease operating any business or rental property? |
| <input type="checkbox"/> | <input type="checkbox"/> | 5 | Did you remove any of your business assets for personal use? |
| <input type="checkbox"/> | <input type="checkbox"/> | 6 | Did you use part of your home for business purposes? |
| <input type="checkbox"/> | <input type="checkbox"/> | 7 | Did you make any contributions to a Keogh or a self-employed SEP plan for 2019? |
| <input type="checkbox"/> | <input type="checkbox"/> | 8 | Do you pay for any health or long term care insurance through your business? |
| <input type="checkbox"/> | <input type="checkbox"/> | 9 | If you or your spouse are self-employed, are either of you covered under an employer's health plan? |
| <input type="checkbox"/> | <input type="checkbox"/> | 10 | Did you purchase any furniture or equipment for your business? |
| <input type="checkbox"/> | <input type="checkbox"/> | 11 | Did you make any improvements to your rental properties? |
| <input type="checkbox"/> | <input type="checkbox"/> | 12 | Did you receive income from raising animals or crops? |

Yes No

Other Deductions

- | | | | |
|--------------------------|--------------------------|----|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 1 | Did you use your car on the job (other than to and from work)? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2 | Did you work out of town for part of the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | 3 | Did you incur unreimbursed expenses working as a reservist, performing artist, or fee-basis gov't official? |
| <input type="checkbox"/> | <input type="checkbox"/> | 4 | Did you incur any travel and entertainment expenses for business purposes? |
| <input type="checkbox"/> | <input type="checkbox"/> | 5 | Did you pay expenses for the care of your child or other dependent so you could work? |
| <input type="checkbox"/> | <input type="checkbox"/> | 6 | Did you purchase a 'clean fuel' or electric hybrid vehicle in 2019? |
| <input type="checkbox"/> | <input type="checkbox"/> | 7 | Did you make energy efficient improvements to your home or purchase any energy-saving property during 2019? |
| <input type="checkbox"/> | <input type="checkbox"/> | 8 | Did you contribute less than an entire interest in any property to charity? |
| <input type="checkbox"/> | <input type="checkbox"/> | 9 | Did you refinance a mortgage or take out a home equity loan during 2019? |
| <input type="checkbox"/> | <input type="checkbox"/> | 10 | Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? |
| <input type="checkbox"/> | <input type="checkbox"/> | 11 | Did you or your spouse pay any educational expenses for yourselves? |
| <input type="checkbox"/> | <input type="checkbox"/> | 12 | Did you pay any student loan interest? |
| <input type="checkbox"/> | <input type="checkbox"/> | 13 | Did you make any federal or state estimated payments? |
| <input type="checkbox"/> | <input type="checkbox"/> | 14 | Did you pay alimony? |
| <input type="checkbox"/> | <input type="checkbox"/> | 15 | Did you donate non-cash donations? |
| <input type="checkbox"/> | <input type="checkbox"/> | 16 | Did you donate a vehicle? |

Yes No

Miscellaneous

- | | | | |
|--------------------------|--------------------------|---|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1 | Did you make gifts of more than \$15,000 to any one person? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2 | Did you engage the service of any household employees? |
| <input type="checkbox"/> | <input type="checkbox"/> | 3 | Did your bank account information change within the last twelve months? |
| <input type="checkbox"/> | <input type="checkbox"/> | 4 | Do you want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | 5 | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | 6 | Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2019? |
| <input type="checkbox"/> | <input type="checkbox"/> | 7 | Did you claim a First-time Homebuyer Credit for a home purchased in 2008? |
| <input type="checkbox"/> | <input type="checkbox"/> | 8 | Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit? |

Yes No

Return preparation and filing

- | | | | |
|--------------------------|--------------------------|---|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1 | Do you want to e-file your return? |
| | | 2 | If you are due a refund, how do you want to receive it? |
| | | | <input type="checkbox"/> Check sent to you in the mail |
| | | | <input type="checkbox"/> Apply to next year's estimates |
| | | | <input type="checkbox"/> Direct deposit (please provide voided blank check) |
| | | | <input type="checkbox"/> Other quick refund via a bank product |
| | | | Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings |
| | | | If you owe taxes, how do you want to pay them? |
| | | | <input type="checkbox"/> Paper check sent with my return <input type="checkbox"/> Credit card |
| | | | <input type="checkbox"/> Direct debit (please provide a voided blank check) |
| | | | <input type="checkbox"/> Installment Agreement |
| | | | Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings |
| <input type="checkbox"/> | <input type="checkbox"/> | 3 | Do you want to allow your tax preparer to discuss this year's return with the IRS? |

If no, enter another person (if desired) to be allowed to discuss this return with the IRS:

Designee's name _____	Phone Number _____	Personal identification Number (5 digit PIN) _____
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Organizer Options

1 Appointment Information

Date:

Day:

Time:

2 Miscellaneous

- Check ("X") to SUPPRESS Social Security Numbers throughout this organizer.
- Check ("X") to display detail sheets for input/adjustment purposes for those marked below with an asterisk.

3 Printing

**Check ("X") to include
in printed Organizer**

**Enter # of additional
blank pages to print**

<input checked="" type="checkbox"/>	Mailing Slip	
<input checked="" type="checkbox"/>	Comments	
<input type="checkbox"/>	Estimated Payments*	
<input type="checkbox"/>	Dependents*	_____
<input type="checkbox"/>	Wages*	_____
<input type="checkbox"/>	Pension*	_____
<input type="checkbox"/>	Foreign Employer Compensation & Pension*	_____
<input type="checkbox"/>	Interest/Dividends (Combined)*	
<input type="checkbox"/>	Interest*	_____
<input type="checkbox"/>	Dividends*	_____
<input type="checkbox"/>	Seller Finance*	_____
<input type="checkbox"/>	Savings Bond Exclusion*	
<input type="checkbox"/>	Alimony	
<input type="checkbox"/>	Business Assets	
<input type="checkbox"/>	Business C-EZ*	
<input type="checkbox"/>	Business C-EZ Vehicle	
<input type="checkbox"/>	Business*	
<input type="checkbox"/>	Business Exp*	
<input type="checkbox"/>	Business Vehicle	
<input type="checkbox"/>	Home Office*	
<input type="checkbox"/>	Sale of Capital Assets (Enter # of copies to print)	_____
<input type="checkbox"/>	Installment Sale*	_____
<input type="checkbox"/>	Rent Royalty*	
<input type="checkbox"/>	Rent Royalty Exp*	
<input type="checkbox"/>	Rent Royalty Vehicle	
<input type="checkbox"/>	K1s*	_____
<input type="checkbox"/>	Farm Rental*	
<input type="checkbox"/>	Farm Rental Exp*	
<input type="checkbox"/>	Farm Rental Vehicle	
<input type="checkbox"/>	Farm*	
<input type="checkbox"/>	Farm Exp*	
<input type="checkbox"/>	Farm Vehicle	
<input type="checkbox"/>	Social Security RRB	
<input type="checkbox"/>	Misc Inc and Ded	
<input type="checkbox"/>	Report Child Income*	
<input type="checkbox"/>	IRA and Other Contribution	
<input type="checkbox"/>	Medical and Dental	
<input type="checkbox"/>	Tax Paid	
<input type="checkbox"/>	Interest Paid	
<input type="checkbox"/>	Employee and Other Misc	
<input type="checkbox"/>	Charity*	_____
<input type="checkbox"/>	Non-Cash Charity (Enter # of copies to print)	_____
<input type="checkbox"/>	Employee Expenses*	
<input type="checkbox"/>	Employee Expenses Vehicle	
<input type="checkbox"/>	Child Care*	
<input type="checkbox"/>	Adoption Expenses*	
<input type="checkbox"/>	Tip Income	
<input type="checkbox"/>	Household Help*	