2018 TAX PROFORMA/ORGANIZER

This Tax Proforma/Organizer package was designed to assist you in collecting the information we need for the preparation of your 2018 income tax return. The following pages contain many of the common income tax items expenses, deductions and credits. You will also be asked to answer certain questions which will help us determine the best way to handle certain items of income or deduction.

Where appropriate, amounts reported on your 2017 income tax return are listed in the shaded right-hand column. Please take time to completely fill out the pages that apply to you and furnish us with any supporting documentation as required. This will enable us to prepare a complete and accurate income tax return. If you need more space, please attach additional schedules.

We will also need the following information:

- ___ Copy of your prior year income tax return (if not in our possession).
- ___ Original Form(s) W-2 and 1099-R received from all employers.
- ___ Original Form(s) 1095-A, 1095-B and 1095-C received.
- ___ Copies of other compensation, moving expense reimbursement, or pension documentation.
- ___ Form(s) 1099 or other statements reporting interest and dividend income received.
- ___ Form(s) 1099B and any other closing documentation regarding the sale or purchase of assets.
- ___ Schedule K-1 showing your share of income and deductions from partnerships, S corporations, estates and trusts.
- ___ Form(s) 1098, copies of real estate bills, property tax bills, mortgage statements, etc.
- ___ Any other information or statements that you received or that you may have questions about.
- ___ CP Notice 28 - Taxable IRA from Roth Rollover

We hope this Tax Proforma/Organizer will help make your task easier. It will certainly help us evaluate your income tax situation thoroughly and concentrate our efforts in preparing a complete and accurate income tax return.

BENTON TAX AND ACCOUNTING LLC
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PLEASANT VALLEY, MO 64068-7973
(816) 792-1616

QUESTIONNAIRE

Question		
Did your filing status change during 2018 ?	___ YES	___ NO
Will the address on your 2018 Federal return be different from the one shown on your 2017 return? If YES, enter the New Address:	___ YES	___ NO

Street ______________________________

City ______________________________

State __________ Zip Code __________

Question		
Were you notified by the Internal Revenue Service or any other taxing authority of changes to a prior year tax return? (If YES, please enclose report notifying you of the change(s).)	___ YES	___ NO
Did you have minimum essential health care coverage for yourself, your spouse (if filing jointly), and anyone you could or did claim as a dependent for every month of 2018 ?	___ YES	___ NO
Did you, your spouse, or a dependent enroll in health insurance through the marketplace/exchange?	___ YES	___ NO
Are you aware of any changes to your income, deductions and credits reported on a prior year return?	___ YES	___ NO
Did you sell and/or purchase a principal residence in 2018 ?	___ YES	___ NO
Did you receive any insurance or other reimbursement from a prior year medical, casualty, or theft loss deduction?	___ YES	___ NO
Do you have any dependent children under 18 who received unearned income (interest, dividends, investment income) of over $1,900?	___ YES	___ NO
If YES, and if your child qualifies, do you elect to report your childs interest and dividends in your income tax return?	___ YES	___ NO
Did you or your spouse receive stock from an employers stock bonus plan (do not include amounts reported on Form W-2)?	___ YES	___ NO
Did you buy or sell any bonds during the year? (If YES, please provide a copy of the brokers report.)	___ YES	___ NO
Did you start a new business during 2018 ?	___ YES	___ NO
Did you receive payments from a pension or profit-sharing plan?	___ YES	___ NO
Did you sell business or personal property(ies) on the installment method, OR did you receive payments from an installment sale? (If YES, please provide details)	___ YES	___ NO
Did you surrender any U.S. savings bonds during 2018 ?	___ YES	___ NO
Did you use the proceeds from Series EE U.S. savings bonds purchased after 1989 to pay for higher education expenses?	___ YES	___ NO
Did you receive tip income NOT reported to your employer?	___ YES	___ NO
Did you receive any tax-exempt interest?	___ YES	___ NO
Did you obtain a loan and use the proceeds for an investment?	___ YES	___ NO

QUESTIONNAIRE

If employed, are you covered under a pension, profit-sharing, stock bonus or other retirement plan?	___ YES	___ NO
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?	___ YES	___ NO
Did you rollover any amount from a Traditional IRA to a Roth IRA during 2016, 2017, or 2018?	___ YES	___ NO
Did you receive any disability payments this year?	___ YES	___ NO
If either you or your spouse are self-employed, are either of you covered under an employer's health plan at another job?	___ YES	___ NO
Did you have foreign income or pay any foreign taxes in 2018?	___ YES	___ NO
Did you sell property or equipment on installment in 2018?	___ YES	___ NO
Did you have any business related educational expenses?	___ YES	___ NO
Did you make gifts of more than $14,000 to any individual?	___ YES	___ NO
Did you make gifts to a trust?	___ YES	___ NO
Did you suffer an uninsured casualty or theft loss on a non-business property?	___ YES	___ NO
Did your employer pay premiums on life insurance in excess of $50,000 where the proceeds are paid to beneficiaries named by you?	___ YES	___ NO
Did you receive any income not included in the Tax Organizer?	___ YES	___ NO
Did you pay any qualifying education expenses for yourself or any dependents?	___ YES	___ NO
Did you make any online purchases for which you did not pay state sales tax? If so, enter the amount of purchases here. ___________________	___ YES	___ NO

Notes: --

Please make certain to report all income received in 2018 . If you received income that is not included in this proforma organizer, attach a schedule listing the income received. Also, describe the nature of the income received (type of income, how received, etc.).

BASIC INFORMATION

Name	Phone 1	
Address	Phone 2	
	Phone 3	
Email		

	Social security number	Occupation	Date of birth	Designate $3 to the Presidential election fund	Blind Yes	Blind No
TAXPAYER				☐ Yes ☐ No	☐	☐
SPOUSE				☐ Yes ☐ No	☐	☐

Filing Status: ☐ Single ☐ Married filing joint ☐ Married filing separate ☐ Head of Household ☐ Qualifying widow(er) with dependent child

If you can be claimed on your parent's or someone else's return, check here ☐

EXEMPTION INFORMATION

DEPENDENTS Name (first, initial, and last)	Date of birth	Dependent's social security number	Relationship	Did dependent live with you	# of months lived in your home

If your child didn't live with you but is claimed as your dependent under a pre-1985 agreement, check here ☐

W-2 INFORMATION Please enclose copies of ALL W-2 forms

Taxpayer **S**pouse	Name of employer	2017 GROSS WAGES	2018 GROSS WAGES	Federal income tax withheld	Social security RR retirement withheld	State	State tax withheld	Local tax withheld

If your employer didn't reimburse you or over reimbursed you for any expense as an employee, check here ☐

If you had employer paid child care benefits, check here ☐

T = Taxpayer
S = Spouse
J = Joint

INTEREST INCOME

T S J	NAME of PAYER	FEDERAL TAX WITHHELD	INTEREST INCOME 2018	INTEREST INCOME 2017
	Seller Financed Mortgage:			
	Other Interest Income:			
	Tax Exempt Interest (not included above)			

T = Taxpayer
S = Spouse
J = Joint

DIVIDEND INCOME

T S J	NAME of PAYER	ORDINARY DIVIDENDS	QUALIFIED DIVIDENDS	CAPITAL GAIN DISTRIB.		FEDERAL TAX WITHHELD	NON-TAXABLE DISTRIB.	ORDINARY DIVIDENDS 2017

FOREIGN ACCOUNTS and FOREIGN TRUSTS:

At any time during the tax year, did you or your spouse have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country ?
If yes, enter the name of the foreign country: ____ YES ___ NO

Were you or your spouse the grantor of, or transferor to, a foreign trust which existed during the tax year, whether or not you or your spouse have any beneficial interest in it ? ___ YES ___ NO

PENSIONS, IRAS, LUMP-SUM DISTRIBUTIONS, GAMBLING

Please enclose copies of ALL **2018** 1099R and W2G forms

Taxpayer Spouse	Name of payer	2017 Total	2018 Total	Taxable amount	Federal withheld	State	State taxable	State withheld	I - IRA D - Disabled P - Pension O - Other

ESTIMATED TAX PAYMENTS

Taxpayer Spouse Joint		2017 REFUND APPLIED TO 2018	1ST PAYMENT		2ND PAYMENT		3RD PAYMENT		4TH PAYMENT	
			Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
	Federal									
	State									
	Other									

	TAXPAYER		SPOUSE	
OTHER INCOME	**2017**	**2018**	**2017**	**2018**
State Refund				
Unemployment received				
Federal withheld				
State withheld				
Railroad unemployment received				
Railroad retirement tier 1 received				
Social security received on SSA-1099 box 5				
Medicare premiums withheld				
Alimony received				
Other income				
ADJUSTMENTS TO INCOME				
IRA contribution				
Self-employed health insurance				
Keogh/SEP contribution				
Early withdrawal penalty (interest forfeiture)				
Alimony paid				
Student loan interest				
Moving expense				
Other adjustments to income				