

ASD

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2018 income tax return. The attached worksheets cover income, deductions, and credits, and will help in the preparation of your tax return by focusing attention on your special needs.

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

When possible, 2017 information is included for your reference. You do not need to make any 2017 entries.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer **yes** to any of the questions, be sure to provide the applicable details.

Please provide the following information:

- 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 pension 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.
- All other information notices you received, or any items you have questions about.

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

WAGNER AND ASSOCIATES  
9550 S EASTERN AVE SUITE 253  
LAS VEGAS , NV 89123  
Telephone: (702)564-1040

# Smart Worksheets from your 2018 Organizer Form

SMART WORKSHEET FOR: ORG0: 2018 Tax Organizer

**Preparer Information:** The last six lines below will print the firm name, preparer name, firm address, firm telephone number, firm fax number, and firm or preparer e-mail address based on the boxes checked below. See help for additional information.

Access Miscellaneous Global Options for Organizer Only to set this globally for all clients (See Help for additional information).

**QuickZoom** to change Miscellaneous Global Options for Organizer . . . . . ►

Check to <b>not</b> print firm name . . . . .	<input type="checkbox"/>
Check to <b>not</b> print preparer name . . . . .	<input checked="" type="checkbox"/>
Check to <b>not</b> print firm address . . . . .	<input type="checkbox"/>
Check to <b>not</b> print firm phone number . . . . .	<input type="checkbox"/>
Check to <b>not</b> print firm fax number . . . . .	<input type="checkbox"/>
Check to <b>not</b> print firm e-mail address . . . . .	<input type="checkbox"/>
Check to print preparer e-mail address (ONLY if firm e-mail is <b>not</b> used) . . . . .	<input type="checkbox"/>
Check to print preparer phone number (ONLY if firm phone number is <b>not</b> used) . . . . .	<input type="checkbox"/>

**QuickZoom** to change preparer and firm information . . . . . ►