BLAIR TAX CONSULTING, LLC

BTC

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3 EASY STEPS TO HELP US PREPARE YOU FOR THE APPROACHING TAX SEASON

1. Your 2017 Tax Organizer is attached. It must be completed and returned to us before we can process your 2017 tax package. You can also get one from our web site at www.blairtax.com**.** Click on the "Tax Organizer" tab at the top of the page, then click on "2017 Tax Organizer." Your Organizer will automatically download to your computer in Adobe (pdf) format. You can then fill it out on screen by tabbing through the fields, print out a copy for us, and save it to your computer for your records.

2. Hold your Organizer until you have all of the forms you are expecting from banks, employers, contractors, etc. You should have everything by February 15th. Once received, place them into an envelope along with the Organizer and send it to us. Feel free to use one of your SASE receipt envelopes.

3. If you have sub-contractors that will need a 1099 from you, supply us with the following information ***by no later than January 15, 2018***: Contractor's name, social security number, address, and amount paid. We will issue the 1099 to your contractor along with a copy to you, and transmit it to the IRS. Faxed or e-mailed submissions are acceptable. Due to the fines and penalties sanctioned by the IRS for late filling of the Transmittal Form 1096, we will NOT process 1099's after January 31, 2018.

REMINDERS

* Your account must be current through December 31, 2017 before we can release your tax package. If this presents a problem, call and we'll do our best to work with you.

* Please do not place receipts for 2017 and 2018 in the same envelope. Mixed receipt envelopes will be returned to you for separation.

If you should have questions about any of the above or the Organizer, please don't hesitate to call.

BLAIR TAX CONSULTING, LLC

2017 Tax Organizer

You must complete and return this Organizer to our office before your tax return can be compiled.

Taxpayer's Name: ______________________________

Spouse's Name: ______________________________

Address for Tax Return:

____

____

____

County of residence: ______________________________

Telephone Numbers:

Home: ______________________________

Cell: ______________________________

Please complete the Tax Organizer in its entirety, and include it with all copies of your W-2's, 1099's, etc. We cannot compile your tax return without a completed Tax Organizer.

DO NOT leave the question about the health insurance on the bottom of page 3 unanswered. It MUST be checked "Yes" or "No" and the appropriate month entered.

Questions that do not pertain to you may be left blank or marked with "NA".

We suggest that you either scan or make copies of all income statements (W-2/1099's) before mailing originals.

Filling Method: (Only one method may be selected.)

Single ☐ Married Filing Jointly ☐ Married Filling Separate ☐ Head Of Household ☐

	Taxpayer	Spouse
Social Security Number:		
Occupation:		
Date Of Birth: (Needed for many State returns.)		

Children and other Dependents: (If you need more room, please use back.)

	1	2	3	4
Full Name:				
Date of Birth:				
Social Security Number:				
Relationship:				

Income: Please list and attach all copies of income Forms (W-2 and 1099) from your job, business or pension.
All income must be listed including income not reported to you on forms W-2 or 1099.

Source	Amount	Source	Amount

If you need more room, please use back.

Interests and Dividend Income. Please list and attach all Forms 1099 for interest and dividends.

Source	Amount	Source	Amount

Alimony received: $ ______________________ Unemployment compensation: $ ______________________

Gambling winnings: $ ______________________ Gambling Losses: $ ______________________

Note: Gambling losses may not be greater than gambling winnings.

Adjustments to income:

Alimony paid or received (Not child support): Please indicate whether paid or received.

To or from whom paid or received: Social Security Number:

______________________________ ______________________________

Contributions to individual retirement accounts:

Taxpayer's IRA: $ ______________________ Spouse's IRA: $ ______________________

Taxpayer's SEP: $ ______________________ Spouse's SEP: $ ______________________

Itemized Deductions:

Taxes: Amount

Real Estate Taxes: ______

Personal Property Taxes: ______

Interest paid: (Attach Form 1098)

Home Mortgage to financial institutions: ______

Home Mortgage paid to individuals: ______

To whom paid: ______ Social Security Number: ______

Address: ______

Contributions: (If not already reported to Blair Tax Consulting.) Amount

Church / Temple ______

Other cash contributions (Cancer fund, heart association, etc.): ______

______ ______

______ ______

Non-Cash Donations (Include receipt): ______

Please answer the following questions :

Are you incorporated? Yes ☐ No ☐

Where there any births, deaths, adoptions, marriages, or divorces in your *immediate family* during the year? Yes ☐ No ☐

Did you sell or purchase any real estate during the year? If yes, please include the closing statement and form 1099S. Yes ☐ No ☐

Did you sell any stocks, bonds, or other property during the year? If yes, include Form 1099B statement from your broker. Yes ☐ No ☐

Did you pay for the care of one or more persons to enable you to work during the year? (Daycare.) If "yes", please call BTC for details. Yes ☐ No ☐

Did you move because of a job change? (Company Drivers only.) Yes ☐ No ☐

Did you have or acquire health insurance coverage during 2017? Yes ☐ No ☐

If "Yes", what month in 2017 did your coverage begin? ______

Did you make any federal or State estimated tax payments for 2017? (Please note which is Federal and which is State.)

Federal or State	Amount	Federal or State	Amount

Delivery method for tax package:

☐ Please mail my tax package via the United States Postal Service (USPS).

☐ Please E-Mail my tax package saving me a week or more of waiting. **(See note below.)**

My E-Mail address is: ______________________________

__NOTE:__ If you choose to have your tax package e-mailed, it will be sent immediately upon completion along with all of the necessary processing instructions. Before selecting this delivery method, be certain that your e-mail address is active, and your printer is capable of quality printing.

Only one delivery method should be checked as we are not permitted to both e-mail and send a copy via the USPS. The same delivery method will apply to both the Federal and State returns. If both boxes are checked we will default to USPS.

Your tax package is being provided free of charge so that you may E-File your return using the tools at www.irs.gov. Instructions for E-Filing are included in the tax package cover letter. If you prefer to mail your return via the USPS, envelopes have been provided.

Your fee payment is for bookkeeping services. Since we are providing the tax package free of charge for the purpose of E-Filling, the "Paid Preparer" section of your return is not signed. This is of no consequence as we stand behind your tax return 100%.

The information contained herein is to the best of my knowledge correct and complete.

______________________________ ______________

Signature (Typed name for emailed submission) Date