From:

Alex C Deshowitz & Julie L Wolfe 545 Chesapeake Ln Southlake, TX 76092

To:

EAST AND ASSOCIATES, PLLC 1703 FOUNTAINVIEW DR STE 101 MANSFIELD, TX 76063

2017 Client Organizer

This information is complete and correct to the best of	my (ou	r) knowledge.
Taxpayer signature	_ Date _	2/4/18
Spouse signature LULUOLFL	_ Date ₋	2/4/18

EAST AND ASSOCIATES, PLLC 1703 FOUNTAINVIEW DR STE 101 MANSFIELD, TX 76063 817-453-4022

Alex C Deshowitz & Julie L Wolfe 545 Chesapeake Ln Southlake, TX 76092

Dear Alex & Julie:

This Tax Organizer is designed to help you gather the tax information needed to prepare your 2017 personal income tax return. To help you complete the Organizer with minimal time and effort, when available, you will find certain information from your 2016 personal income tax return.

To protect your privacy, your Tax Organizer contains masked data. Masked data displays as asterisks. For example, a Social Security number could display as ***-**-6789, an account number as *******6789, and a date of birth as **/**/2000. If you would like to confirm the masked data or make a change to your data, please contact this office. Do not indicate any changes to your data on your Tax Organizer. When you receive your completed tax return(s), make sure you review all Social Security numbers, bank account numbers, and dates of birth for accuracy.

Enter 2017 information on the Tax Organizer pages provided. If any information does not apply to you or is incorrect, please draw a line through it or make the necessary corrections.

The Client Questionnaire asks about pertinent tax items necessary for preparing the most accurate tax return possible. Please answer all questions and attach a statement when necessary for additional information not provided in the Client Organizer.

You will also need to provide the following information:

- Forms W-2 for wages, salaries and tips.
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, etc.
- Schedule K-1 from partnerships, S corporations, estates and trusts.
- Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit.
- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including any Form 1098-C).
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by this office.

IRS regulations require paid tax preparers who expect to prepare and file 11 or more federal individual or trust tax returns to file them electronically. To comply with this requirement your

return will be electronically filed this year. The benefits of e-filing include a secure way to file tax returns and it provides proof of acceptance that the IRS has accepted your return for processing. Contact this office if you prefer your return be filed on paper.

Thank you for the opportunity to serve you.

Sincerely,

EAST AND ASSOCIATES, PLLC

Questions

Please check the appropriate box and include all necessary details and documentation.

	Yes	No
Personal Information		
Did your marital status change during the year? If yes, explain:		ķ
Did your address change from last year?)ZĮ
Can you be claimed as a dependent by another taxpayer? Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority		P
during the tax year?		M
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been		
a victim of identity theft? If yes, attach the IRS letter.		血血
Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include hurricane and tropical storm victims in Georgia, Florida, Puerto Rico, the Virgin Islands and parts of Texas, Louisiana and South Carolina, as well as wildfire victims in California.		P
Dependent Information		
Were there any changes in dependents from the prior year?	_	4
If yes, explain:		1
Do you have any children under age 19 or a full-time student under age 24 with		
unearned income in excess of \$2,100?		Ø
Do you have dependents who must file a tax return?		Ø
Did you provide over half the support for any other person(s) other than your		٠
dependent children during the year?		风
Did you pay for child care while you worked, looked for work, or while a full-time student?	_	_
Did you pay any expenses related to the adoption of a child during the year?	8	N N
If you are divorced or separated with child(ren), do you have a divorce decree	ш	Pa
or other form of separation agreement which establishes custodial responsibilities?	Ø	
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or	_	
have they been a victim of identity theft? If yes, attach the IRS letter.		M
Purchases, Sales and Debt Information		,
Did you start a new business or purchase rental property during the year?	_	ren.
Did you sell, exchange, or purchase any assets used in your trade or business? Did you acquire a new or additional interest in a partnership or S corporation? Did you sell, exchange, or purchase any real estate during the year? Did you purchase or sell a principal residence during the year? Did you foreclose or abandon a principal residence or real property during the year? Did you acquire or dispose of any stock during the year? Did you take out a home equity loan this year? Did you refinance a principal residence or second home this year? Did you sell an existing business, rental, or other property this year? Did you lend money with the understanding of repayment and this year it	00000000	英口西英克西属国河南
became totally uncollectable?		'চর্মা
Did you have any debts canceled or forgiven this year, such as a home mortgage or	_	Ø.
student loan(s)?		K
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell		,
vehicle this year?		P

Income Information		
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? Did you receive any income from property sold prior to this year? Did you receive any unemployment benefits during the year?	000	西西西
Did you receive any disability income during the year?		西域河域区
Did you receive tip income not reported to your employer this year?		Ä
Did any of your life insurance policies mature, or did you surrender any policies? Did you receive any awards, prizes, hobby income, gambling or lottery winnings?		
Do you expect a large fluctuation in income, deductions, or withholding next year?	5	₩.
bo you expect a large fluctuation in income, accurations, or withholding flext year?		74
Retirement Information		
Are you an active participant in a pension or retirement plan?	Þ	
Did you receive any Social Security benefits during the year?		Ø
Did you make any withdrawals from an IRA, Roth, myRA, Keogh, SIMPLE, SEP,		
401(k), or other qualified retirement plan?		Ø
If yes, were any withdrawals due to a Federally declared disaster?		
Did you receive any lump-sum payments from a pension, profit sharing or	restate	
401(k) plan?		Þ
Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP,	}_	_
401(k), or other qualified retirement plan?	×	
Education Information		
Did you, your spouse, or your dependents attend a post-secondary school		
during the year, or plan to attend one in the coming year?)EI	
Did you have any educational expenses during the year on behalf of yourself,	7-4	_
your spouse, or a dependent? If yes, attach any Form(s) 1098-T and receipts for		
qualified tuition and related expenses	TEL	
Did anyone in your family receive a scholarship of any kind during the year?		X
If yes, were any of the scholarship funds used for expenses other than tuition,		
such as room and board?		
Did you make any withdrawals from an education savings or 529 Plan account?		X
Did you make any contributions to an education savings or 529 Plan account?		ŻΑ
Did you pay any student loan interest this year?		N
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?		X
Would you like a worksheet to aid in the completion of a Free Application for Federal Student Aid (FAFSA) with the U.S. Department of Education?		
rederal student Aid (FAFSA) with the O.S. Department of Education?	_	-
Health Care Information		
Did you have qualifying health care coverage, such as employer-sponsored coverage		
or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and		
anyone you can claim as a dependent. If yes, attach any Form(s) 1095-B and/or 1095-		
you received. Did anyone in your family qualify for an exemption from the health care coverage	Ø	
mandate? Examples of exemptions include (but are not limited to) certain non-citizen	c	
members of a health care sharing ministry, members of Federally-recognized Indian	3,	
tribes, and exemptions requested from the Marketplace. If yes, attach the Exemption		
Certificate Number (ECN) or type of exemption.		M
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under		/ `
the Affordable Care Act? If yes, attach any Form(s) 1095-A you received.		ÞΚ
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under		
the Affordable Care Act and share a policy with anyone who is not included in		
your family?		Ā
Did you make any contributions to a Health savings account (HSA) or Archer MSA?		D
Did you receive any distributions from a Health savings account (HSA), Archer	_	rec
MSA, or Medicare Advantage MSA this year?		Ø

	Did you pay long-term care premiums for yourself or your family? Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 5498-QA you received. Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, attach any Form(s) 1099-QA you received. If you are a business owner, did you pay health insurance premiums for your employees this year? Did you receive any Health Coverage Tax Credit (HCTC) advance payments? If yes, attach any Form(s) 1099-H you received.	0 0 0	P P P P P
Ite	emized Deduction Information		
	Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment, to substantiate all contributions made.		海口口区
	Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgment from the donee organization.		14
	Did you pay real estate taxes for your primary home and/or second home?	A	D D
	Did you pay any mortgage interest on an existing home loan? If yes, attach any		16
	Form(s) 1098 you received. Did you incur interest expenses associated with any investment accounts you held? Did you have an expense account or allowance during the year? Did you use your car on the job, for other than commuting? Did you work out of town for part of the year? Did you have any expenses related to seeking a new job during the year? Did you make any major purchases during the year (cars, boats, etc.)?	1000000	回域域可域域回
	Did you make any out-of-state purchases (by telephone, internet, mail, or in person)	_	_
	for which the seller did not collect state sales or use tax?		Ø
M	iscellaneous Information		
	Did you make gifts of more than \$14,000 to any individual? Did you utilize an area of your home for business purposes? Did you engage in any bartering transactions? Did you retire or change jobs this year? Julie Changed from Sally Did you incur moving costs because of a job change? Did you pay any individual as a household employee during the year? Did you make energy efficient improvements to your main home this year? Did you receive a distribution from, or were you a grantor or transferor for a foreign		四口四口回回回
	trust?		D
	Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country? Do you have any foreign financial accounts, foreign financial assets, or hold	_	Þ
	interest in a foreign entity?		
	Did you receive correspondence from the State or the IRS?	A	
	If yes, explain: Late flung of partnership return Do you have previous years of tax returns that are either unfiled or filed with		
	unpaid balances due?		M
	Do you want to designate \$3 to the Presidential Election Campaign Fund? If you	-	,
	check yes, it will not change your tax or reduce your refund.		应

Form ID: INDX

Client Organizer Topical Index

This client organizer topical index is designed to help you quickly locate the items listed. To use the index just locate the topic and refer to the page number listed. The page number corresponds to the number printed in the top right corner of your organizer sheets. Please note this organizer is customized specifically for you, and may not contain all of the pages listed here.

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Please note the following conventions used throughout your client organizer: T/S/J and T/S headings should be used to indicate if an item belongs to the (T)axpayer, (S)pouse, or (J)oint. Also, if an item did not occur in your resident state, please indicate the state's postal code abbreviation in which the item occurred. Control totals and [] numbers are for preparer use only.

Form ID: INDX

orm ID: 1040		Perso	nal Information			1
iling (Marital) status code (1	= Single, 2 = Married fili	ng joint, 3 = Married filing	separate, 4 = Head of househo	ld, 5 = Qualifying widow(e	er))	_2[1
Mark if you were married but	t living apart all ye	ar				(2
Mark if your nonresident alie	n spouse does not	have an Individual	Taxpayer Identification	Number (ITIN)		[3
ocial security number		,	Taxpayer ***-**-8567 _[4]		Spouse * * * - * * -	-5935 ₁
irst name		Ale			Julie L	[7
ast name		Deshowitz	[8]	Wolf		 [9
Occupation	Airl:		ascience Mar[10]		Consultant	[:
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Mark if dependent of anothe		, ,	[15]			
axpayer with income less th	an 1/2 support ag	e 18 or 19 - 23 full-	time student? (Y, N) [17]			
Mark if legally blind			[20]			1
ate of birth			$07/21/1988_{[22]}$		08/03/	1969
ate of death		ran sawa ni firaj <u>a</u>	[26]			
Vork/daytime telephone nur	mber/ext number		[28] [29]		[30]	
lome/evening telephone nu	mber		[32]			
o you authorize us to discus	s your return with	the IRS? (Y, N)	Y [34]			
		Presen	t Mailing Address			
ddress partment number			545 Chesa	peake Ln		
ity, state postal code, zip co	de		Southlake	(40)	TX[41] 76092	[
oreign country name	ue		Jouchiake	[40]	1 X [41] /0092	
oreign phone number						
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n care of addressee	(*Plo		dent Information ndent Codes located at Social Security No.	the bottom)	Months**Dep in Codes home * **	Care expenses paid for depende
- ov		ease refer to Depe	ndent Codes located at		in Codes	expenses paid for
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Form ID: Bank

Direct Deposit/Electronic Funds Withdrawal Information

3

Form ID: Bank

Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If you would like to have a refund direct deposited into or a balance due debited from your bank account(s), please enter information in the fields below. Note that electronic funds will be withdrawn only from the primary account listed below.

Mark to verify all accounts listed below have been reviewed, updat	ted as needed, and a	re correct.				_[1]
Primary account:					2110	90673[3]
Financial institution routing transit number Name of financial institution	Southwest	Airlines	Fod	22	_	
Your account number	BOUCHWest 1	HTTTI162			985570	[4]
Type of account (1 = Savings, 2 = Checking, 3 = IRA*)			30	013	903370	[5]
Mark if married filing jointly and this is a joint account (Both taxpaye		4				
						_[7]
Mark if financial institution is foreign based (Not located in the territoria Enter the maximum dollar amount, or percentage of total refund			(0)	. 0		_[8]
chief the maximum donar amount, or percentage of total refund	Dollar		_[9] o	r P	ercent (xxx.xx)	[10]
Secondary account #1:						
Financial institution routing transit number						[25]
Name of financial institution						[26]
Your account number				-		[27]
Type of account (1 = Savings, 2 = Checking, 3 = IRA*)						[28]
Mark if married filing jointly and this is a joint account (Both taxpaye	er and snouse names are on	the account)				_[29]
Mark if financial institution is foreign based (Not located in the territoria						_[30]
Enter the maximum dollar amount, or percentage of total refund			[11] o	r Da	ercent (xxx.xx)	[30] [12]
Enter the maximum donar amount, or percentage or total relation			_(11) 0			[12]
Secondary account #2:						
Financial institution routing transit number						[31]
Name of financial institution					-	[32]
Your account number						[33]
Type of account (1 = Savings, 2 = Checking, 3 = IRA*)						[34]
Mark if married filing jointly and this is a joint account (Both taxpaye	r and snouse names are on	the account)				_[35]
Mark if financial institution is foreign based (Not located in the territoria						_[36]
Enter the maximum dollar amount, or percentage of total refund			[15] 0	r Pi	ercent (xxx.xx)	
*Refunds may only be direct deposited to established traditional, Roth or SEP-IRA accounts	. Make sure direct deposits	s will be accepted by	the bank	or fin	ancial institution.	
Refund - U.S. Series	I Savings Bond P	urchases				
A tax refund may be used to buy up to \$5,000 of U.S. Series I Savir to purchase U.S. Series I Savings bonds (in increments of \$50) with Please note you may enter only one name per registration (with e name, do not use nicknames.	your refund, if app	licable, please	comple	te t	he following i	nformation.
Indicate either a maximum dollar amount (up to \$5,000), or percenta	age of refund you wo	uld like used to	nurcha	se h	onds	
The bonds will be registered to the name(s) on the return. For married filing joint returns						
To register the bonds separately, leave these fields blank and use the fields provided bel		se registered in both	Harries III	icu o	ii tiie retuiii.	
Enter either a dollar amount or percent, but not both	o	Dollar	[13]	or	Percent (vvv vv)	[14]
and an			_(15)	0.	refeelt (AAAIAA)	(±.,]
Bond information for someone other than taxpayer and spouse, if ma	arried filing jointly					
Maximum dollar amount (up to \$5,000), or percentage of refund us		d ® ollar	[17]	or	Percent (vvv vv)	[18]
Owner's name (First Last)	sea to parenase som					
Co-owner or beneficiary (First Last)		[40]				[39] [41]
Mark if the name listed above is a beneficiary						[42]
Bond information for someone other than taxpayer and spouse, if ma	arried filing jointly					
Maximum dollar amount (up to \$5,000), or percentage of refund us		de allas	[24]		Danage ()	(22)
Owner's name (First Last)	sed to purchase bond					
Co-owner or beneficiary (First Last)						[44]
Mark if the name listed above is a beneficiary		[45]				
Mark if the name instead above is a belieficiary						_[47]

General