2014	1040	US	Tax Organizer	
	Rount	ree Cons	ulting, Inc.	Tax Return Appointment
		El Camino F emente, CA	Real Suite 206 92672	Date:
	Fax nu	nber:	·: (949) 366-3180 949-366-3181	Time: Location:
		address: tax organiz	er will assist you in dather	ing information necessary for the preparation
	1115	of you	ur 2014 tax return. Please	enter all pertinent 2014 information.
NOTE: If you of: school re records, plac	i claim the ea cords or state cement agenc	arned income o ement, landlor cy statement, s	credit, please provide proof that y d or property management statem social service records or statemer	our child is a resident of the United States. This proof is typically in the form ent, health care provider statement, medical records, child care provider t, place of worship, Indian tribal office statement, or employer statement.
NOTE: If you or social ser	ir child is disa vices agency	abled, please or program st	provide one of the following forms atement.	of proof of disability: doctor statement, other health care provider statement
CLIENT	INFORMA	TION	Taxpayer	Spouse
	nd initial			
	ty number			
•		-		
	(m/d/y)			
	h (m/d/y)			
Home phone				
•				
	ion			
•				
E-mail addre	SS			
		In care of		
		Street addres		
Add	ress	Apartment nu		
		City State		
		ZIP code		
DEPEN	DENTS	211 0000		
		I	Dependent No.	Dependent No.
	(m/d/y)			
	(m/d/y) h (m/d/y)	-		
	ity number			
•	at home			
			Dependent No.	Dependent No.
First name .			•	
Last name				
Title/suffix				
Date of birth	(m/d/y)			
	h (m/d/y)			
	ty number			
Months lived	at home			

	1040	US	Tax C	Organizer					
		a governm	ent form f	all pertinent for an item, o	2014 inform check the bo	ation. If you have x and do not ente	e attached er a 2014 a	amount.	
	GES, SALAI oyer name:	RIES AND	TIPS			2014 Amo	unt	2013 Amou	ınt
							-		
_						Attach Form	1S VV-2		
NTE		ОМЕ							
Payer □	r name:								
						Attach Forme	1000 INT		
						Attach Forms	1099-1111		
	DEND INCC r name:	JINE							
							-		
-						Attach Forms	1099-DIV		
							-		
	SIONS, IRA		BLING IN	NCOME					
	I SIONS, IRA r name:	AND GAN	ABLING IN	NCOME					
		AND GAN	ABLING IN	NCOME		Attach Fo			
		A AND GAN	ABLING IN			Attach Fo 1099-R & V			
Payer	r name:								
Dayer	r name:	reported on ¹	W-2G						
Payer	r name: Winnings not Total gamblin	reported on ^v g losses	W-2G						
Payer	Winnings not Total gamblin	reported on ¹ g losses	W-2G DRMS - II	NCOME					
Payer	Winnings not Total gamblin Form 1099-B	reported on ¹ g losses RMENT F(- Sales of sto	W-2G DRMS - II Dck (also inc		n history)	1099-R & V	N-2G	rmc 1000	
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Payer	r name: Winnings not Total gamblin IER GOVER Form 1099-B Form 1099-MI Form 1099-K	reported on V g losses RMMENT F(- Sales of sta ISC - Miscella - Merchant c	W-2G DRMS - II pock (also inco aneous incor ard and third	NCOME clude transactio	n history) payments	1099-R & V	N-2G	rms 1099	
Payer DTH	r name: Winnings not Total gamblin IER GOVER Form 1099-B Form 1099-MI Form 1099-K Form 1099-S Form 1099-G	reported on ¹ g losses RMENT F(- Sales of sto ISC - Miscella - Merchant c - Sales of re	W-2G DRMS - II pock (also inco aneous incor ard and third al estate (als	NCOME Clude transaction me	n history) payments ng statements)	1099-R & V	N-2G	rms 1099	
Payer DOTH	r name: Winnings not Total gamblin IER GOVER Form 1099-B Form 1099-K Form 1099-S Form 1099-G ayer:	reported on ¹ g losses RMENT F(- Sales of sta ISC - Miscella - Merchant c - Sales of re- - State tax re	W-2G DRMS - II pock (also inco aneous incor ard and third al estate (also efunds	NCOME Slude transaction me	n history) payments ng statements)	1099-R & V	N-2G	rms 1099	
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Payer DTH Faxpa DF DF DF DF DF DF DF DF DF DF	r name: Winnings not Total gamblin IER GOVER Form 1099-B Form 1099-M Form 1099-M Form 1099-G ayer: Form 1099-G ayer: Form SSA-10 Form 1099-G se: Form SSA-10 Form 1099-G Se: Form SSA-10 Form 1099-G Se: Form 1099-G	reported on ¹ g losses RIMENT F(- Sales of str ISC - Miscella - Merchant c - Sales of re - State tax re 99 - Social s - Unemployn 99 - Social s - Unemployn US INCOIV Alimony recei	W-2G	NCOME Clude transaction me	n history) payments ng statements)	1099-R & V Attach Form	N-2G Attach For 15 1099	rms 1099	
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14 DETI	1040	US	Tax Organizer		
DETI					
	REMENT F		TRIBUTIONS	2014 Amount	2013 Amount
Тахрау	yer: Tradition	al IRA contrib	utions (1=maximum)		
	Roth IRA	contributions	; (1=maximum)		
	Self-employ	yed, SEP, SIMPL	, & qualified plan contributions (1=maximum)		
Spouse	e: Tradition	al IRA contrib	utions (1=maximum)		
			; (1=maximum)		
	Self-employ	yed, SEP, SIMPL	, & qualified plan contributions (1=maximum)		
отис			ORMS - DEDUCTIONS		
			interest		
			lated expenses	Affach Forms 1098	
ADJU	JSTMENTS		ME		
Тахрау	/er:				
Se	If-employed I	health insurai	nce premiums		
	•				
Oth	ner adjustme	nts to income	:		
_					
<u></u>		<u> </u>	A 00N		
Alıı	mony paid - I	Recipient nar	ne & SSN	·	
				-	
Spouse	e:				
		health insurai	nce premiums		
Ed	ucator exper	nses	·		
		nts to income			
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Alir	mony paid -	Recipient nar	ne & SSN		
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MEDI		DENTAL E	YPENSES		
			5		
			ayer		
			ISE		
			ortation expenses		
			·		
i turnoc					

TAXES PAID

State income taxes - 1/14 payment on 2013 state estimate	
State income taxes - paid with 2013 state extension	
State income taxes - paid with 2013 state return.	
State income taxes - paid for prior years and/or to other states	

	1040	US	Tax Organizer		
ταχι	ES PAID (c	continued)		2014 Amount	2013 Amount
	•	•	ayment on 2013 city/local estimate		2013 Amount
-		•	th 2013 city/local extension		
-		•	th 2013 city/local return		
-		•	ept autos and special items)		
			es		
		•	urn		
	•		above		
Sales	taxes paid o	n boats, aircra	aft, and other special items		
Real e	estate taxes -	principal resi	dence		
Real e	estate taxes -	property held	I for investment		
Foreig	n income tax	kes			
Pe	ersonal prope	erty taxes (inc	luding automobile fees in some states).	Attach Tax Notice	
INTE	REST PAI	D			
Home	mortgage inf	terest and poi	nts paid:		
				Attach Forms 1098	
\square _					
Home n	nortgage interest	not on Form 1098	3 (include name, SSN, & address of payee):	Г	1
_			•		
Points	not reported	l on Form 109	8:		
Morta	an incurence		n post 12/31/06 contracts		
-	-	•	margin accounts):		
nivesi			nargin accounts).		
Passiv	ve interest				
	H CONTRI				
NOTE	: No deductio	on is allowed f	or cash or check contributions unless th	e donor maintains a bank record, o	r a written communicatior
NOTE	: No deduction from the do	on is allowed f nee, showing	or cash or check contributions unless the name of the organization, contribution	e donor maintains a bank record, o on date(s), and contribution amoun	r a written communicatior t(s).
NOTE	: No deduction from the do	on is allowed f nee, showing	or cash or check contributions unless the name of the organization, contribution	e donor maintains a bank record, o on date(s), and contribution amoun	r a written communicatior t(s).
	from the do	nee, showing	the name of the organization, contributi	on date(s), and contribution amoun	r a written communicatior t(s).
	from the do	nee, showing	or cash or check contributions unless the name of the organization, contributions	on date(s), and contribution amoun	r a written communicatior t(s).
Volun [.] Numb	from the do teer expense er of charitat	s (out-of-pock	the name of the organization, contributi	on date(s), and contribution amoun	r a written communicatior t(s).
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Volun [.] Numb NON	from the do teer expense er of charitat	nee, showing s (out-of-pock ble miles NTRIBUTIO	the name of the organization, contributine the name of the name of the organization, contributine the name of the name	on date(s), and contribution amoun	t(s).
Volun Numb NON NOTE	from the do teer expense er of charitat CASH COI : No deduction a deduction	nee, showing s (out-of-pock ble miles NTRIBUTIO on is allowed f i for any item	the name of the organization, contribution (et)	on date(s), and contribution amoun	t(s).
Volun Numb NOTE MISC	from the do teer expense er of charitat CASH COI : No deduction a deduction	s (out-of-pock ole miles NTRIBUTIO on is allowed f of or any item	the name of the organization, contribution (NS) For contributions of clothing and househow with minimal monetary value may be de CTIONS	on date(s), and contribution amoun	t(s).
Volun ⁻ Numb NOTE MISC Union	from the do teer expense er of charitat CASH COI : No deduction a deduction CELLANEC and professi	s (out-of-pock ble miles NTRIBUTIO on is allowed f of any item DUS DEDUC onal dues	the name of the organization, contributions intertion of clothing and househow with minimal monetary value may be described CTIONS	on date(s), and contribution amoun	t(s).
Volun Numb NOTE MISC Union Tax re	from the do teer expense er of charitat CASH COI : No deduction : No deduction : ELLANEC and professi eturn prepara	s (out-of-pock ole miles NTRIBUTIO On is allowed f of or any item DUS DEDUC onal dues tion fee	the name of the organization, contribution (et)	on date(s), and contribution amoun	t(s).
Volun Numb NOTE MISC Union Tax re Safe (from the do teer expense er of charitat CASH COI : No deduction : No deduction CELLANEC and professi eturn prepara deposit box re	s (out-of-pock ble miles NTRIBUTIO on is allowed f f for any item DUS DEDUC onal dues tion fee ental	the name of the organization, contributions etc. NS for contributions of clothing and househow with minimal monetary value may be decomposed CTIONS	on date(s), and contribution amoun	t(s).
Volun Numb NOTE MISC Union Tax re Safe o Invest	from the do teer expense er of charitat CASH COI : No deduction a deduction CELLANEC and professi eturn prepara deposit box re ment expens	s (out-of-pock ble miles NTRIBUTIO on is allowed f o for any item DUS DEDUC onal dues tion fee ental	the name of the organization, contributions (et)	on date(s), and contribution amoun	t(s).
Volun Numb NOTE MISC Union Tax re Safe o Invest Estate	from the do teer expense er of charitat CASH COI : No deduction : Status : No deduction : Status : No deduction : Status : No deduction : Status : S	s (out-of-pock ble miles NTRIBUTIO on is allowed f of for any item DUS DEDUC onal dues tion fee ental 691(c)	the name of the organization, contributions inet). INS ior contributions of clothing and househor with minimal monetary value may be de CTIONS	on date(s), and contribution amoun	t(s).
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Volum Numb NOTE NOTE MISC Union Tax re Safe o Invest Estate Unreir	from the do teer expense er of charitat CASH COI : No deduction a deduction CELLANEC and professi eturn prepara deposit box re ment expens e tax, section nbursed emp	s (out-of-pock ole miles NTRIBUTIO On is allowed f of or any item DUS DEDUC onal dues tion fee ental 691(c)	the name of the organization, contributions inet). INS ior contributions of clothing and househor with minimal monetary value may be de CTIONS	on date(s), and contribution amoun	t(s).

ORGANIZER			Pac	qe 5
2014	1040	US	Miscellaneous Questions	
	lf ai	ny of the fo app	ollowing items pertain to you or your spouse for 2014, please check the ropriate box and provide additional information if necessary.	
YES	NO	-	ONAL INFORMATION	
		Did your i	marital status change during the year?	
		Did your a	address change during the year?	
		Could you	u be claimed as a dependent on another person's tax return for 2014?	
			NDENTS re any changes in dependents?	
			y of your unmarried children who might be claimed as dependents 19 years of age or older (or 24 years tudent) at the end of 2014?	s or
		Did you h dividend i	nave any children under age 19 or full-time students under age 24 at the end of 2014, with interest and income in excess of \$1,000, or total investment income in excess of \$2,000?	l
			TH CARE COVERAGE and your dependents have health care coverage for the full-year?	
		Did you re (Health C	eceive any of the following IRS documents? Form 1095-A (Health Insurance Marketplace Statement), 1 coverage) or Form 1095-C (Employer Provided Health Insurance Offer and Coverage) If so, please attac	1095-B ch.
		exemption	your dependents did not have health care coverage during the year, do you fall into one of the followin ns categories: Indian tribe membership, health sharing ministry membership, religious sect membershi tion, exemption non-citizen or economic hardship? If you received an exemption certificate, please atta	ip,
		INCON Did you re	IE eceive unreported tip income of \$20 or more in any month?	
		Did you c yourself,	eash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses your spouse, or your dependents?	for
		Did you re	eceive any disability income?	
		Did you h	have any foreign income or pay any foreign taxes?	
		Did you s	HASES, SALES AND DEBT start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, ation, trust, or REMIC?	
			purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or conver assets to business use?	rt any
		Did you b	buy or sell any stocks, bonds or other investment property in 2014?	
		Did you p	ourchase, sell, or refinance your principal home or second home, or did you take a home equity loan?	
			nake any residential energy-efficient improvements or purchases involving solar, wind, geothermal or figy sources?	uel
		Did you h	nave any debts cancelled or forgiven?	
		Does any	rone owe you money which has become uncollectible?	

ORGANIZER			Page	6
2014	1040	US	Miscellaneous Questions (continued)	
	lf ar	ny of the fo app	ollowing items pertain to you or your spouse for 2014, please check the ropriate box and provide additional information if necessary.	
YES	NO		EMENT PLANS eceive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?	
		Did you m	nake a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?	
		Did you tr	ransfer or rollover any amount from one retirement plan to another retirement plan?	
		Did you re	ATION eceive a distribution from an Education Savings Account or a Qualified Tuition Program? your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or al school?	
		Did you ir Did you w	ZED DEDUCTIONS ncur a loss because of damaged or stolen property? vork out of town for part of the year? use your car on the job (other than to and from work)?	
		Did you a If you hav refunded)	IATED TAXES apply an overpayment of 2013 taxes to your 2014 estimated tax (instead of being refunded)? we an overpayment of 2014 taxes, do you want the excess applied to your 2015 estimated tax (instead of be ? xpect your 2015 taxable income and withholdings to be different from 2014?	eing
		Do you wa Does you May the II Did you h	ELLANEOUS vant to allocate \$3 to the Presidential Election Campaign Fund? or spouse want to allocate \$3 to the Presidential Election Campaign Fund? VRS discuss your tax return with your preparer? have an interest in or signature or other authority over a financial account in a foreign country, such as a ba securities account, or other financial account?	ınk

DRGANIZER			Page	7
2014	1040	US	Miscellaneous Questions (continued)	
	lf an	ly of the fo app	llowing items pertain to you or your spouse for 2014, please check the ropriate box and provide additional information if necessary.	
YES	NO		ELLANEOUS (continued) eceive a distribution from, or were you the grantor of, or transferor to, a foreign trust?	
		Was your	home rented out or used for business?	
		Medicare	ave a medical savings account (MSA), a Medicare Advantage MSA, or acquire an interest in an MSA or a Advantage MSA because of the death of the account holder? Or, were you a policyholder who received under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life policy?	
		Did you ir	ncur moving expenses due to a change of employment?	
		Did you e	ngage the services of any household employees?	
		Were you	notified or audited by either the Internal Revenue Service or the State taxing agency?	
		Did you o	r your spouse make any gifts to an individual that total more than \$14,000, or any gifts to a trust?	
		Were you	(or your spouse) the beneficiary of COBRA premium assistance for any month during 2014?	
		Did your I	pank account information change within the last twelve months?	