



AAG Tax & Accounting LLC

TAX ORGANIZER

Dear Client,

Enclosed is your Tax Organizer for tax year 2019.

Your Organizer contains several sections that include common expenses and deductions that many taxpayers overlook. Please review these sections carefully. Depending upon your tax bracket, you may save as much as \$37 for each \$100 in deductible expenses you find in your 2019 records.

If our firm prepared your return last year, your prior year amounts are included in the Prior Year Amount column of your Organizer. Use this information to help you remember the types of income and deductions you reported last year.

To complete the Organizer, enter all relevant information in the designated areas on each page. Please add any notes or questions that will help us prepare a complete and accurate return for you and to plan with you how to manage your tax situation in future years.

If you answer 'Yes' to any of the General Business and Investment questions, please provide detailed information with your answer.

Please arrange to either drop off your documents to our office at-2600 Berlin Turnpike, Newington, CT 06111 or please make arrangements for an in office appointment.

When you arrive for your appointment, please bring your Organizer and any of the following that apply to your tax situation:

- Last year's tax return (if not in our possession)
- Original Form(s) W-2
- Schedule(s) K-1 from partnerships, S-corporations, estates or trusts
- Information about contributions to a pension or other retirement plan if this is the first year you received income from the plan
- Form(s) 1099 or statements reporting dividend, interest, retirement or other income
- Broker statements providing details of capital gains transactions
- Form(s) 1098 and copies of real estate tax bills, etc.
- Legal documents pertaining to the sale or purchase of real property-Settlement Statement.
- Donations Address of Donee Amounts, over \$5000 letter from organization

- Hud 1 Statements for all property Purchases and Sales
- Expenses to be claimed for any renovations
- Additions to Cost basis of Property
- Dates Properties placed in service
- Income derived from property-Expenses related to operations
- Utility bills, receipts for maintenance/repairs, all related documents
- Copies of all 1099's issued

Partnerships

- Financial Statements-Income Statement & Balance Sheet for all LLC's
- Partner information-Name, SS, DOB, Address ownership percentages
- Tax Matters Partner designation for LLC's

Please note we may require additional documents once we begin the review.

If you have any questions before your scheduled appointment, please give us a call.

Sincerely,

AAG Tax & Accounting, LLC