



# 2008 Client Organizer

## CLIFFORD & ASSOCIATES

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Name: \_\_\_\_\_

Use this organizer to gather tax information for this year's filing season. You may drop off your materials at our office or send materials via fax or email as a convenient way to forward your information in less time. See our website for email instructions: <http://www.sharetheharvest.com/email.htm>

The following pages contain common income, deductions, expenses, and credits. The information required by this form, as it applies to you, will help us evaluate your tax situation and concentrate our efforts in preparing a complete return. Do not copy information printed plainly on W-2's, 1099's, and other tax reporting statements.

Please read through the organizer carefully. Use the sections that apply. Skip the sections that do not. If you need more space, please copy pages or attach a separate sheet. When done, bring the form with you to your appointment or hand-deliver, mail, email, or fax it to us along with your tax statements, W-2's, and 1099's.

Please complete the following checklist. If you have included more than one of any item, please indicate the quantity in the box provided:

- Copy of previous year's tax return (if not prepared by Clifford & Associates)
- Original Forms(s) W-2 received from all employers; include all copies
- Form(s) 1099-INT/1099-DIV/1099 Misc/1099-R/1099-G for reporting interest/dividends/independent contractor income/pension income, IRA distributions, and certain life insurance policies
- Tax reporting statements from brokerage firms, custodian, or mutual fund company, Form(s) 1099-B or other documents used in reporting sales/purchases or stocks, mutual funds or other assets.
- Form(s) SSA-1099 or RRB-1099 for Social Security or equivalent Railroad Retirement
- Form(s) 1098 for reporting mortgage interest and points paid
- Schedule K-1 for reporting partnership, estate, and trust income and deductions
- Any IRS letters or other information and statements you have questions about
- Detailed profit and loss statement for Schedule C-sole proprietorships or rental property
- Statement(s) of unemployment benefits or alimony amounts
- Statement(s) of gambling winnings, prizes, awards, jury-duty pay, or hobby income
- I declare that to the best of my knowledge and belief, the information included in this organizer is true, correct, and complete.**