



2010 Client Organizer

CLIFFORD & ASSOCIATES, LLC

4150 Belden Village St. NW, Suite 601, Canton OH 44718
 (330) 493-1814 Toll-Free: 1-800-456-1803 Fax: (330) 493-1807 contact@sharetheharvest.com
www.sharetheharvest.com

Name: _____

You may 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 the organizer carefully. Complete only the sections that apply. 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. Copies of documents are sufficient. We do not need your originals.

	Copy of previous year's tax return (if not prepared by Clifford & Associates)
	Form(s) W-2 received from all employers
	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 Railroad Retirement benefits
	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
	HUD-1 statement, if you bought/sold/refinanced your home
	Form(s) 1099-A and/or 1099-C related to cancellation of debt, foreclosure, etc.
	Form(s) 1098-T and/or 1098-E and college account statement(s)