Weller Consulting USCC
12540 Broadwell Rd Ste
2201
Alpharetta, GA 30004
Phone/Fax: (888)327-9306
Email: tax@wellerconsulting.com

Thank you for selecting our Business and Tax Services from Weller Consulting USCC. Our passion is to educate our clients to help them live their life in a more tax-deductible way. We take pride in our ability to make certain that every client receives direction and service based on their individual needs.

1. SUMMARY OF SERVICES

For Individuals

Tax Services

- ✓ Federal and State Income Tax Preparation (1040, 1040A, 1040EZ)
- ✓ Electronic Filing of Tax Returns
- ✓ Amended Returns
- ✓ IRS Problem Resolution
- ✓ Tax Education -Personal Consultation & Seminars
- ✓ Advanced Tax Strategies and Planning
  - Tax Action Planner - develops customized strategies that detail the specific steps you need to take to start saving thousands in taxes.
  - IRA Recovery - will allow you to have direct control over your IRA investments.

For Businesses

Tax Services

- ✓ Federal and State Income Tax Preparation for:
  - Sole Proprietorships
  - S-Corporations
  - C-Corporations
  - Partnerships, LLCs, LLPs,
- ✓ Amended Returns
- ✓ IRS Problem Resolution
- ✓ Tax Education - Personal Consultation & Seminars
- ✓ Advanced Tax Strategies & Planning
  - ❖ Total Business Analysis - an in-depth look at your past, current and future financial goals that analyzes where you are in your business and maps a strategy on how to get where you want to go. It includes the Tax Action Planner, an efficiency review of your accounting procedures, a tax education consultation and an advanced tax strategy planning consultation. A complimentary review of your past three year's tax returns is required as a pre-requisite.
  - ❖ Tax Action Planner - develops customized strategies that detail the specific steps you need to take to start saving thousands in taxes.
  - ❖ IRA Recovery - will allow you to have direct control over your IRA investments.

Business Services Available

- ✓ QuickBooks Setup, Training & Account Maintenance
- ✓ Accounting
- ✓ Bookkeeping
- ✓ Complete Payroll Services and Year End Reporting for W-2 employees and 1099 contractors
- ✓ New Business Start-ups
- ✓ Incorporation of New C-Corporations, S-Corporations, LLPs, LLCs
- ✓ Corporation Minutes & By Laws

2. NEW CLIENT PROCEDURES

- All new clients are encouraged to call for a free 30-minute consultation with one of our tax professionals.

- We offer a free review of your most recently filed tax return. Our experience shows us that approximately 70% of business owners and 20% of other income earners overpay their taxes by not fully understanding the law. If we determine that you have overpaid your taxes by more than double of what the tax preparation fees would cost you, you may want to have the tax return amended. We can also help you amend your tax returns to correct any understatement of taxes that is discovered in order to be in compliance with the tax laws.

3. TAX ORGANIZER - *Tax preparation clients must complete*

THIS IS THE MOST IMPORTANT STEP IN THE PREPARATION OF YOUR TAX RETURN.

Our Tax Organizer is the beginning point in establishing a relationship with you so that we may understand your unique tax situation. It is a systematic series of YES and NO questions that have been designed to help us prepare your tax return so that you pay the least amount of taxes. Please do not be overwhelmed the number of organizers. Many areas will not apply to you and you need only fill out the ones that are appropriate for you. Once you begin answering the questions you will realize how the process flows and before you know it, you will be finished!

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. It may be necessary to ask you for clarification of some of the information; however, we will not audit or otherwise verify the data you submit. Our work in connection with the preparation of your income tax return does not include any procedures designed to discover misappropriation of money or other irregularities, should any exist. Should we have to render accounting and bookkeeping assistance necessary for preparation of the income tax returns this will be charged and included in your estimate of your total cost? You should retain all the documents, cancelled checks and other data that form the basis of income and deductions for minimum of (7) years. These may be necessary to prove the accuracy and completeness of your returns to a taxing authority. You have the final responsibility for your income tax returns. Therefore, be sure to review them carefully before you sign them.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authority interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

It is essential that you complete the Tax Organizer before you fax or send it to our office. Additional charges will be incurred for bookkeeping and consultation services necessary to compile information you do not provide in the Tax Organizer or if information is otherwise incomplete to prepare your tax return.

4. ADDRESS, PHONE NUMBER & E-MAIL ADDRESS CHANGES

It is important that you notify us of all address, phone number and e-mail address changes.

5. OFFICE HOURS
Monday - Friday: 9:00 AM to 5:00 PM EST.

6. DEADLINES

1040 – INDIVIDUAL (see note below)		
SUBMIT INFORMATION TO WELLER CONSULTING USCC:	**IRS FILING DEADLINE**	***EXTENSIONS**
March 15th	**April 15th**	**ONE SINGLE EXTENSION FILED BY APRIL 15TH WILL EXTEND THE DUE DATE TO OCTOBER 15TH**
September 15th	**October 15th**	**NO ADDITIONAL EXTENSION IS AVAILABLE.**

CORPORATE with tax years ending 12/31 (see note below)		
SUBMIT INFORMATION TO WELLER CONSULTING USCC:	**IRS FILING DEADLINE**	***EXTENSIONS**
February 15th	**March 15th**	**ONE SINGLE EXTENSION FILED BY MARCH 15TH WILL EXTEND THE DUE DATE TO SEPTEMBER 16TH**
August 16th	**September 16th**	**NO ADDITIONAL EXTENSION IS AVAILABLE.**

PARTNERSHIPS, LLCs or LLPs with tax years ending 12/31 (see note below)		
SUBMIT INFORMATION TO WELLER CONSULTING USCC:	**IRS FILING DEADLINE**	***EXTENSIONS**
February 15th	**March 15th**	**ONE SINGLE EXTENSION FILED BY MARCH 15TH WILL EXTEND THE DUE DATE TO SEPTEMBER 16TH**
August 16th	**September 16th**	**NO ADDITIONAL EXTENSION IS AVAILABLE.**

LLC's: LLC's can be taxed in several ways depending on their unique structure. Please note that their deadline will be the same as the entity type they have elected to be taxed as. Please call our office with any questions. (See note below.)

FISCAL YEAR ENTITIES: All entities not using the calendar year: Your deadline to submit complete paperwork to Weller Consulting USCC is four weeks prior to your IRS filing deadline. (See note below.)

NOTE: We can only guarantee meeting the above IRS deadline if the information submitted to Weller Consulting USCC is **COMPLETE** and provided to us by the dates indicated in the first column. **There will be a $150 rush fee added to any return whose information was not submitted to us by our deadline for information submission but is requesting an on time filing by our firm to comply with the IRS filing deadlines.**

***EXTENSIONS:** An extension is a request for additional time to file a tax return, NOT additional time to pay your taxes. If you owe taxes and file an extension without sending a payment, the IRS may assess penalties and interest on the delinquent taxes. If we currently are working on your taxes and don't have all the required information to complete the return by the due date, we will automatically file an extension for you.

7. ESTIMATED QUARTERLY TAX PAYMENTS (1040ES, 1120ES) AS WELL AS STATE TAX PAYMENTS IF REQUIRED (ie. 500ES for GA)

We strongly encourage all business owners, C-Corporations and LLC's taxed as C-Corporations to have quarterly evaluations of their tax situation. This is imperative for helping you to avoid penalties and interest payments.

Estimated quarterly tax payments for 2018 are due to the IRS by **April 15th, June 15th, September 15th, and January 15th, 2020.**

8. STATE TAX

Other States: We prepare state tax returns for all states where required. Generally we prepare your state tax return automatically at the time your taxes are prepared.

9. PROCESSING TIME

Current Tax Year: Our office will process all returns on a first come, first serve basis. Since all work is customized, each return may take a different amount of processing time. If all the information provided is complete, it will take at a minimum of 48 hours to prepare, however, the actual time will depend upon having complete information and your response time to requests for missing data. To expedite the process please:

- Answer every question with all the required information and make sure that The Tax Organizer you provide to Weller Consulting USCC is complete.
- Provide any additional information requested by Weller Consulting USCC as soon as possible, but no longer than three (3) days from the initial request.
- Call our office for assistance or clarification when needed in completing the organizers.

Amended and Previous Years Returns: Amended and previous years tax returns are done strictly on an as-time-allows basis. Generally, amended and previous years returns are not processed by Weller Consulting USCC during heavy tax deadline periods but will be considered after the initial tax season is complete. ***Note***: The IRS will take approximately 90 days to process amended returns.

10. IRS CORRESPONDENCE

In the event that you receive a notice from the IRS for any reason, please mail or fax a copy of it to our office immediately. **DO NOT CONTACT THE IRS DIRECTLY AND DO NOT PAY ANY BALANCES REQUESTED UNTIL OUR OFFICES CAN REVIEW THE SITUATION. IF THE NOTICE IS A RESULT OF SOMETHING OUR OFFICE OVERLOOKED, THERE WILL BE NO CHARGE FOR TIME SPENT RESOLVING THE ISSUE. IF THE NOTICE IS NOT THE FAULT OF OUR OFFICE, WE WILL CHARGE A SET FEE FOR HANDLING AND RESOLVING THE ISSUE.**

11. FEES & SERVICES

Tax Preparation: Charges are based on the complexity and amount of time required to prepare your return. Upon receiving your package of information we will provide you with an estimate of the cost to prepare your return and will get a signed agreement to proceed before working on your return. While it is impossible to give exact estimates for preparing a return without information of what is involved, below will give you likely price ranges for common tax situations for IRS returns:

$195 - $495 per tax year for a basic return without a business
$350 - $650 per tax year if you have one home-based business* (Schedule C)
$725 per tax year for a corporate return* (1120, 1120S)
$625 per tax year for a partnership return (1065)
$695 per tax year for Trust return (1041)
$595-$895 per tax year for Exempt Organization return (990ez, 990)

*Multiple businesses, bookkeeping, accounting or other situations will incur additional costs. One state return will be included in the above prices. Any additional states required will incur an additional fee of $85 per state.

Tax Return Amendments: We will provide the service of amending previous years tax returns on an as time allows basis.

$350 - $550 per tax year for amended return (1040, 1040EZ)
$595 per tax year for corporate amended return (1120, 1120S, 1065)

State Tax Preparation: We provide state tax returns for any state that might be needed. Our fee is $65 per state tax return prepared.

Retainer Fees: – If you are a new client to Weller Consulting, we reserve the right to require a retainer fee to start the preparation process and will be applied towards the final preparation costs.

Tax Filing Extensions: FREE for our clients

E-file: **FREE** for both Federal & State if we prepare your return, otherwise $45 Federal, $25 State.

Fee Collect Service: Fee collect is a service we offer to our clients. It allows you to have your tax preparation fees deducted from your IRS refund without having to pay upfront costs before e-filing. The cost is $55.

Shipping & Handling: Client is responsible for getting all items needed for tax return preparation to our office. Should our clients choose to have their documents and any original backup documents mailed back to them instead of picking up at one of our office locations, shipping fees of $5 will apply and will be added to your tax return preparation fee. This is in addition to any rush fees that may be added to your return for late submission of information.

Copies of Tax Returns: We will provide clients with an electronic copy of all tax return(s) done by our company that will be stored in the clients' secure online portal. The information will be available 24/7 to all clients via a personal login. If you would like a hard copy, we will gladly provide them for a service fee of $15.

QuickBooks:
-Set-up Starts at $250
-Training $95 per hour
-Account Maintenance $95 per hour

Bookkeeping: We provide monthly or quarterly bookkeeping services starting at $150/mth.

Payroll Services:
-Set-up $250 one-time fee per company.
-Monthly Fees Starts at $150 per month. Can be customized to your needs

12. PAYMENT POLICY

- A retainer fee may be required for New Clients to begin the desired service.
- Payment of all tax preparation services is due in full upon completion and before e-file of return or receipt of filing copy unless you are using the Fee Collect service we offer.
- Credit Cards accepted are MASTERCARD, VISA, or AMEX thru Paypal
- Payment by a personal or business check is also accepted and will be converted to an e-check electronically upon receipt of routing and account number and prior to filing.

All invoices are due and payable upon receipt unless other arrangements have been made prior to tax preparation. In accordance with the laws of the State of Georgia, finance charges will accrue at $35 per month or portion thereof on any balance due on work that is held or otherwise unpaid thirty (30) days past invoice date. In the event of non-payment for services, the client will be responsible for all costs and fees of the collection process, including attorney and court costs necessary to collect the debt.

13. OUR PRIVACY POLICY

We obtain private personal information about you from the following sources:

- We receive information from you on any applications, tax processing worksheets, miscellaneous documents or any other forms that we use to prepare your income tax return;

- Information regarding your business dealings with us or others; and

- Information we acquire from any consumer reporting agencies.

There will be no disclosure of any private or nonpublic personal information about you to any outside sources, except as permitted by law when you have given written permission.

If for any reason you decide not to continue as a client of our practice, we will continue to abide by the privacy policies and practices as detailed in this notice.

Access to your personal account is restricted to those employees who must know certain information about you in order to provide appropriate required services.

14. HOW TO GET YOUR TAX INFORMATION TO US

We try to make filing your taxes with us as easy and convenient as possible so we offer several ways in which you can get your information to us:

- ☐ Mail your tax organizers and **copies** of your original tax forms to us at: 12540 Broadwell Rd Ste 2201, Alpharetta GA 30004 **OR** our PO Box 676, Alpharetta GA 30009. **(Please do NOT send us original forms)**
- ☐ Fax all organizers and required W2's, 1099's, etc. to 1-888-327-9306 or 678-623-0588.

- ☐ Meet with us in person to discuss any items and give us your documents.
- ☐ Scan and upload your documents securely on our website thru the Secure Send link, or an email link emailed to you, or thru your own secure client portal which you can access at the Weller Client Login link on our website.

We are always here to assist you with any questions or concerns you may have about our service, our process, or how to fill out the tax organizers. Your confidence in our ability to provide you with highest quality of service is very important to us. Should you have any questions, please give us a call at 1.888-327- 9306.

15. HOW TO CONTACT US

Mailing Address: Weller Consulting, 12540 Broadwell Rd Ste 2201, Alpharetta, GA 30004
Phone: 1.888.327.9306 (24/7)
Local: 678-813-5292
Fax: 678-623-0588
Web Page: www.wellerconsulting.com
E-Mail: gina@wellerconsulting.com; tax@wellerconsulting.com

This Tax Organizer is designed to help you collect and report the information needed to prepare your 2018 individual income tax return. **If you have any business entities other than a sole proprietorship, or LLCs treated as a sole proprietorship, please complete the Business entity organizer for the information that applies to those entities.** The attached worksheets cover income, deductions, and credits and will help us in the preparation of your tax return by focusing attention on your special needs.

Please enter your 2018 information in the designated areas on the worksheets. If you need to include additional information please include additional pages.

Note: The General Questions and Business/Investment Questions worksheets include a variety of questions designed to assist in completing your tax return. If you answer yes to any of the questions, be sure to provide the applicable details.
Please provide the following information:

- Signed copy of the tax engagement letter
- Signed copy of the consent to use form
- A copy of your 2017 tax returns or last filed year (if we did not complete them).
- Copies of any W2s or other compensation, health insurance or pension documentation, such as Form 1099MISC, Form 1099R or Form 1095A, B or C.
- Schedule(s) K1 showing income or loss from partnerships, S corporations or estates or trusts.
- Form(s) 1099DIV or 1099INT or statements reporting dividend and interest income. Brokerage statements showing transactions for stocks, bonds, etc.
- Form(s) 1098 (reporting interest paid) copies of real estate tax bills and other information relating to real property holdings.
- Copies of closing statements regarding the sale or purchase of real property. If you had a sale, please include the original purchase HUD-1 as well.
- All other information notices you received, or any items you have questions about.

Thank you for taking the time to complete this Tax Organizer so that we can better serve you and make sure you pay only the taxes you are legally required to pay.

2018 TAX ORGANIZER

Taxpayer Information

Last name ____

First name ____

Middle Initial _______

Social security number __________________________________

Date of birth ____________________________

Occupation ____________________________

Work phone___________________Cell phone________________Email_______________________________

Address ____

City____________________________State______________Zip Code _______________

Home phone__________________ Fax Number ___________________

Spouse Information

Last name ____

First name ____

Middle Initial _______

Social security number __________________________________

Date of birth ____________________________

Occupation ____________________________

Work phone___________________Cell phone________________Email_______________________________

Dependents

First Name Last Name	MI Suffix	SSN Relationship	Date of Birth	Months lived With Taxpayer	Childcare Expenses

CHILD AND DEPENDENT CARE & EDUCATION EXPENSES

Name	Address	ID #	Phone #	Amount Paid	What Dependent

Education Tuition and Fees

Students First Name	Students Last Name	MI	SSN	Qualified Expenses

Student Loan Interest Paid

Enter total 2018 qualified student loan interest paid (should have been issued a 1098T)

Taxpayer _______________________

Spouse_________________________

Dependent ______________________

Attach Form(s) W2 _ Wages, Salaries, Tips and Other Compensation

Employer Name(s)

You

____

____

____

Spouse

____

____

____

Attach Form(s) 1099INT – Interest Income

1099INT Payer Name

____
____
____
____
____
____
____

Interest You Received But You Did Not Receive a 1099

Payer Name Interest Received

____ ____________________________
____ ____________________________
____ ____________________________
____ ____________________________

Attach Form(s) 1099DIV – Dividend Income

1099DIV Payer Name

____
____
____
____

Attach Any Form 1099INT or 1099DIV issued to your children

Childs Name 1099 Payer Name

__________________________________ ______________________________________
__________________________________ ______________________________________
__________________________________ ______________________________________
__________________________________ ______________________________________
__________________________________ ______________________________________
__________________________________ ______________________________________

Attach Form(s) 1099MISC – Miscellaneous Income

1099MISC Payer Name

____
____
____
____

If you have a Sole Proprietorship Business (this includes Single Member Disregarded LLCs) please complete the Sole Proprietor Income and Expenses Organizer.

Attach Form(s) 1099B, Sales of Stocks, Bonds and Securities

1099–B Issuer

Also please complete the Sales of Stocks and Securities Organizer.

Attach Form(s) 1099S, Sales Real Estate

Address(es) of property sold

Please also attach the HUD1 closing statement for both the purchase and sale of the property. If you did a 1031 exchange then also attach a copy of the report from your Qualified Intermediary.

Attach Form(s) 1099R - Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAS, etc

1O99R Payer Name

Attach Form(s) SSA1099 - Social Security/Railroad Benefits

	Taxpayer	Spouse
Social Security Benefits from Form SSA1099	___________	__________
Railroad Retirement Benefits from Form RRB1099	___________	__________
Medicare B premiums withheld	___________	__________

Other Government Forms to attach:
Form(s) 1099C — Certain Government Payments, Form(s) W2G — Gambling or Lottery Winnings, Form(s) 1099Q —Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability Income, etc.

____
____
____
____
____
____

Retirement Plan Contributions

	Taxpayer	Spouse
Traditional IRA contributions made for 2018	______________	______________
Roth IRA contributions made for 2018	______________	______________
SEP, Individual 401(k) or SIMPLE Contributions	______________	______________

	Taxpayer	Spouse
Educator Expenses	______________	_____________

(Eligible educators may deduct up to $250 for books, supplies and materials used in their class room. An Eligible educator is a person who is a K – 12 th grade teacher, instructor, counselor, principle or aide who spends at least 900 hours per school year)

Health Savings Account Contribution	_____________	_____________

Medical and Dental Expenses | Amount

Medical and Dental Expenses	Amount
Prescription medications	____________________
Health insurance premiums	____________________
Doctors, dentists, etc	____________________
Hospitals, clinics, etc	____________________
Eyeglasses and contact lenses	____________________
Miles driven for medical purposes	____________________
Other medical and dental expenses:	
____	____________________
____	____________________

Taxes

Real estate taxes paid on principal residence	____________________
Real estate taxes paid on additional homes or land	____________________
Auto license registration fees based on the value of the vehicle	____________________
Other personal properly taxes	____________________

Interest Expenses

Home mortgage interest paid on personal residence or vacation home **(not investment properties)** – **Attach Form(s) 1098.** Please note that you may only deduct interest on acquisition mortgages of $1,000,000 or less and home equity loans of $100,000 or less. Please indicate loans over these limits

Lender Name	Amount
____	____________________
____	____________________
____	____________________

Points paid on loan to buy, build or improve main home

Lender Name	**Amount**
____	____________________
____	____________________

Rules for deducting charitable contributions.

The rules for charitable deductions have become much stricter than in past years.

For Cash and Credit Card Contributions

No deduction will be allowed for contributions of cash, checks, or other monetary gifts, regardless of the amount, unless you have either 1) a bank record (canceled check), 2) a receipt, letter or other written communication from the donee, indicating the donee’s name, and the contribution date and amount.

For contributions of $250 or more you must substantiate it by a contemporaneous written acknowledgement from the donee. Generally the acknowledgement must contain the amount of the contribution and a good faith estimate of the value of any goods or services received in exchange for the contribution.

For Noncash Contributions

Donations of clothing or household items that are not in “good” used condition or better will only be allowed if the item has a value of more than $500 and a qualified appraisal is attached to the return. The donation of qualified vehicle (car, truck, boat or aircraft) valued at over $500 must be substantiated with a form 1098C issued by the donee. The form 1098 must be attached to the tax return.

For donations with a value of less than $250 you must have a receipt from the donee indicating the donee’s name, the date and location of the donation, and a detailed description of each donated item (the value is not required to be on the receipt).

For donations with a value of $250 or more must be substantiated by a contemporaneous written acknowledgement from the donee. Generally the acknowledgement must contain a detail description of the item contributed and a good faith estimate of the value of any goods or services received in exchange for the contribution.

For donations of more than $5,000 must also attach a qualified appraisal to the tax return.

Charitable Contributions – Cash or Credit Card

Charitable Organization	Amount
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________
____	______________________

NonCash Charitable Contributions

Attach all receipts with details listing the following information: Donee, donee address, description of donation, date acquired and date contributed, your cost, value at time of donation, and how you acquired the property. (If the total of all of your non-cash contributions are above $500, please make sure you submit copies of the donation receipts that include the name and address of the donor and how you obtained the items initially)

Miscellaneous Deductions (<u>do not include expenses for your sole proprietorship</u>)

Employee Business Expenses (these are related to your W2 Income for items you are NOT reimbursed for by your employer)

Vehicle expenses – (Please complete Car and Truck Organizer)

Union and professional dues ___________________

Professional subscriptions, books, supplies ___________________

Uniforms and protective clothing (including cleaning) ___________________

Job search costs ___________________

Other unreimbursed employee expenses (list):

Parking fees, tolls, and local transportation ___________________

Travel expenses (excluding meals and entertainment) ___________________

Business gifts ___________________

Education ___________________

____ ___________________

____ ___________________

____ ___________________

____ ___________________

Amount reimbursed by employer for above expenses ___________________

Other Miscellaneous Deductions

Tax return preparation fees ___________________

Investment counsel and advisory fees ___________________

Certain attorney fees (please describe purpose) ___________________

Safe deposit box rental ___________________

Gambling losses (to the extent of gambling income) ___________________

IRA custodial fees ___________________

Other miscellaneous deductions (list):

____ ___________________

____ ___________________

____ ___________________

____ ___________________

ACA Healthcare Questions

	Yes	No
1. Did you, your spouse and all dependents have qualified health insurance In force for ALL 12 months of 2018? (***This includes Medicare or other state Subsidized healthcare insurance such as Peach Care for children)*** ***You can assume that insurance purchased through your employer is qualified***	☐	☐

If No, please fill out the ACA Healthcare Tax Organizer

2. Did you receive a 1095 Form from Health & Human Services (healthcare.gov)	☐	☐
3. Did you, your spouse and/or dependents receive a subsidy/credit from Health & Human Services (healthcare.gov). **If yes, should have received a 1095A form**	☐	☐
3. Did you, your spouse and/or dependents receive an exemption code from Health & Human Services (healthcare.gov) for NOT having qualified insurance coverage, or not having it for the entire 12 months of 2018? **If yes, attach the letter/code.**	☐	☐

General Questions

	Yes	No
1. Did you purchase a motor vehicle or boat during 2018? *If yes, attach documentation showing sales tax/Ad Valorem paid.*	☐	☐
2. Did your marital status change during 2018? If yes, explain: ___________________________	☐	☐
3. Were you or your spouse permanently and totally disabled in 2018?	☐	☐
4. Do you have dependents who must file their own return?	☐	☐
5. Do you have children under age 18 with investment income greater than $1,050 or earned income greater than 6,300?	☐	☐
6. Did you provide over half the support for any other person during 2018 not shown on your return as a dependent?	☐	☐
7. Did you incur adoption expenses during 2018?	☐	☐
8. Did you receive a total distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan with in 60 days of the distribution?	☐	☐
9. Did you convert all or part of a regular IRA into a Roth IRA?	☐	☐
10. Did you receive any disability payments in 2018?	☐	☐
11. Did you operate an unincorporated business? ***(If yes, please complete the Sole Proprietor Business Income and Expense Organizer)***	☐	☐
12. Are you a Realtor© who receives a 1099 under your social security number?	☐	☐

(If yes, please complete the Realtor Income and Expense Organizer)

General Questions Yes No

13. Did you start or operate an S corporation, Partnership or Limited Liability Company in 2018? ☐ ☐

(If yes please complete the appropriate business entity organizer)

14. Did you use an automobile for your business in 2018? ☐ ☐

(If yes, please complete the Car and Truck Organizer)

15. Did you maintain a home office in 2018? ☐ ☐

(If yes, please complete the Home Office organizer)

16. Did you receive tip income not reported to your employer? ☐ ☐

17. Do you own rental or investment real estate? ☐ ☐

(If yes, please complete the Rent and Royalty Income and Expense Organizer for each property And include purchase documents and mortgage interest statements)

18. Did you buy, sell or refinance a principal residence or other real property in 2018? ☐ ☐

(If yes, attach closing or escrow statements (HUD 1)

19. Did you invest in oil and gas? **If yes please send K1** ☐ ☐

20. Did you invest in any partnerships? **If yes, please send K1(s)** ☐ ☐

(K1's typically come late so it is OK to send them later)

21. Did you incur any casualty or theft losses during 2018 Including any insurance claim? **If yes, provide details** ☐ ☐

22. Did you incur any non-business bad debts? ☐ ☐

23. Did you pay any individual for housecleaning in 2018 and you want to report it to IRS? ☐ ☐

24 Did you buy or sell any stocks or bonds in 2018? ☐ ☐

(If yes, please complete Sales of Stocks and Securities Organizer)

25. Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses? ☐ ☐

26. Did you incur any moving expenses? **If yes, attach details** ☐ ☐

27. Did you receive any income not included in this Tax Organizer? ☐ ☐

(If yes, please attach information)

28. Were you notified by the IRS or state taxing authority of changes to a prior year's return? ☐ ☐

(If yes, enclose copy of notice or report)

29. Do you expect your income and deductions in 2019 to be the same as 2018? ☐ ☐

(If no, attach explanation of changes expected)

General Questions (Continued)

30. If you paid any alimony, enter the following:
Recipient's SSN:_________________Alimony paid: ______________

31 Enter your home tax state of : Taxpayer____________Spouse ____________

Electronic Filing and Direct Deposit of Refund

All tax returns prepared by our firm are required to be filed electronically unless they contain a form that is not accepted electronically OR if the taxpayer refuses electronic filing. If you refuse electronic filing, please contact us to let us know.

The Internal Revenue Service is able to deposit most all refunds directly into taxpayer's accounts.

	Yes	No
If you receive a refund would you like direct deposit	☐	☐
If yes, please provide a voided check (not a deposit slip).		
What type of account is this Checking [ ] Savings [ ]		
Is this account outside the US?	☐	☐
If you are receiving a refund from IRS, would you like to take advantage of our Fee Collect service that allows you to pay your tax preparation fees from your tax refund with **NO UPFRONT FEES**?	☐	☐

The Fee is $55 that will be deducted from your Federal Refund

Estimated Taxes Paid

Date Federal State____State_____Local_____

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Additional Information

(Enter any additional information here and attach any documents.)

WELLER | CONSULTING

12540 Broadwell Rd Ste 2201 • Alpharetta, GA 30004
Phone/Fax: 888-327-9306 • info@wellerconsulting.com

Dear Client:

To begin your tax preparation, please sign the Client Acknowledgement form and **fax to us at 1.888.327.9306 or 678.623.0588**. **This signed form is required to begin work on your returns.**

It is an honor and pleasure to have the opportunity to work with you for your 2018 tax preparation. We also provide tax planning, and welcome the opportunity to assist you with ways to reduce your taxes and keep more money in your pocket. If you have any questions, please call us at **1.888.327.9306.**

Gina Weller

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CLIENT ACKNOWLEDGEMENT

I declare all information I have provided Weller Consulting USCC is true and correct to the best of my knowledge. I understand that in the event of an audit by the Internal Revenue Service, I am solely and completely responsible to provide written documentation and proof of all statements made on my tax return. I realize that Weller Consulting USCC is advising me and providing tax services to the best of their knowledge and belief; however, Weller Consulting USCC is in no way liable for the content of my return which is provided solely by me and not verified by Weller Consulting USCC. Additional charges will be incurred for any bookkeeping and consultation services necessary to compile information not provided on Weller Consulting USCC Organizer or if information is otherwise incomplete to prepare the tax return. I understand and release Weller Consulting USCC and any persons involved of any liability in late filing in the event that I do not provide information requested to prepare my income tax return within three (3) days after receiving the official request, whether verbally or in writing.

I have read the policies and procedures outlined in Weller Consulting USCC General Tax Organizer and agree or acknowledge all information contained therein. I am requesting that Weller Consulting USCC prepare my returns and I agree to pay for services rendered immediately upon receipt of invoice prior to electronic filing.

X____ ________________

Taxpayer Signature Date

X____ ________________

Spouse Signature Date

Please print name of any business entities to be included:

____