Willyoung & Co PA John W Willyoung 4301 West Cayuga Street Tampa, FL 33614

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General Information Taxpayer Spouse First Name Middle Initial Last Name Suffix Social Security Number . . . Date of Birth Date of Death Check ("X") which phone number to list on return. Home Phone Work Phone Cell Phone Fax Number Legally Blind Totally Disabled Claimed as a Dependent . . . Presidential Election Fund (\$3) Occupation E-mail address State of Residence as of 12/31 . . County of Residence as of 12/31. School District as of 12/31 . . Sales tax rate of locality in 2019 . If Part Year, Period of Residency . ____ to Additional information is being requested this filing season in an effort to combat stolen-identity tax fraud. Please provide the requested information from the driver's license or state-issued identification card. Providing the information could help process state returns faster. ID type Driver's license OR State Issued ID Driver's license OR ID number _ ID issuing state _____ ID issue date _____ ID expiration date . Filing Status Status on 2018 return: Status as of 12/31/2019: Single Enter ("X") in the box 2 Married filing joint 3 Married filing separately (Enter spouse's name and SSN above) Head of Household Non-dependent name: Non-dependent SSN: 5 Qualifying widow(er) with minor child Year spouse died Taxpayer's Address Apt/Suite : Street State City Zip Code If address is in a foreign country, enter that country . . . Foreign postal code Foreign province/county . . If a bona fide resident of a U.S. territory, enter territory . . **Preparer's Information** Firm's name Willyoung & Co PA Street 4301 West Cayuga Street Tampa State 33614 **Attestation and Signature:** To the best of my knowledge the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records. Sign Date

here

			Questions
Yes	No	1 2 3 4 5 6 7	Personal Information Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year? Did you purchase or sell your principal residence or did your address change? Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return? Were you in a Registered Domestic Partnership, civil union or same-sex marriage during 2019? Were either you or your spouse in the military or National Guard? Have you been notified by the IRS or state of changes to a prior year's return, or received any other tax correspondence? Have you or your spouse been an identity theft victim and given an identity theft protection six digit PIN by the IRS?
Yes	No No	1 2 3 4 5 6 7	Dependents Are there any changes in your dependents from last year? Did you have any children under 19 (or 24 if a full time student) who received more than \$1,100 in investment income? Did you pay education expenses for your dependent children? Did anyone in your family receive a scholarship of any kind during 2019? Did you pay any dependent care expenses for a child or a parent? Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent? Are all of your dependents either US residents or citizens? Health Care Coverage Did you or a member of your family have minimum essential coverage in 2019? (The entity that provided the coverage may have sent you a Form 1095-A, 1095-B, or 1095-C, that lists individuals in your family who were enrolled in minimum essential coverage and shows their months of coverage.)
Yes	No	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	Income (In 2019, did you or your spouse have any of the following?) Wages? (include form(s) W-2) Non-employee compensation? (include form(s) 1099-MISC) Interest income? (include form(s) 1099-INT) Dividend income? (include form(s) 1099-DIV) Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account? Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses. Social security or Railroad Retirement benefits? (include form(s) SSA-1099 & RRB-1099) Did you receive a state or local refund, or a refund of any other deduction you itemized in a prior year? (attach 1099-G) Disability income? (include form(s) W-2 or 1099) Unemployment compensation? (include form(s) 1099-G) Alimony? Did you receive tip income NOT reported to your employer? Did you receive payments from a Long-Term Care insurance contract? Did you barter your services for goods or services from someone else? Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp? Did you cash in any U.S. savings bonds? Did you make a loan to someone at an interest rate below market rate? Did you receive a housing allowance for ministerial services you provided? Did you receive any income not reported in this Organizer?
Yes Yes	No No No	1 2 3	Did you own an interest in a Real Estate Mortgage Investment Conduit (REMIC)? Foreign Reporting Did you have an interest in or signature authority over a financial account in a foreign country? Were you the grantor of or transferor to a foreign trust? Did you receive income from a foreign source or pay taxes to a foreign government? Retirement & Other Plans Did you receive any distributions from a retirement plan? (Include form(s) 1099-R)
Was .		2 3 4 5 6 7	Did you rollover a retirement plan distribution into another plan? Did you convert a traditional IRA to a Roth IRA? Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Did you receive a distribution from an Achieving a Better Life Experience (ABLE) savings account? Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA) Did you make any contributions to an HSA (Health Savings Account) in 2019?
Yes	No	1 2 3 4 5 6 7	Purchases, Sales, Gains and Losses Did you exchange any securities or investments for something other than cash? Do you have any short sales, commodity sales, or straddles? Did you receive Form 2439? Did you buy or sell any bonds? Did you receive stock from a stock bonus plan with your employer? Did you sell any other personal assets at a gain? Did you sell any real estate (other than your home) during the year?

Name _

SSN ____

	8	Did you sell any assets using the installment method?					
	9	Did you receive proceeds from a prior year installment sale? Did you purchase a rental property?					
	11	Did you exchange any property? Did you exchange any property for other property?					
	12	Did you incur a loss because of damaged or stolen property?					
\vdash	13	Did you purchase a new vehicle, aircraft or Did any security become worthless during 2					
\vdash	15	Did any debts become uncollectible during 2					
	16	Did you puchase any items acquired out of		il order that did not inc	lude sales tax?		
Yes	No	Business and Rental Property Incor	me & Deductions				
	1	If you own rental property, do you qualify as	a Real Estate Profess	sional?			
\vdash	2 3	Did you sell any part of an existing business?	or call business asse	ate?			
\vdash	H 4	Did you sell any part of an existing business, or sell business assets? Did you cease operating any business or rental property?					
	5	Did you remove any of your business assets	s for personal use?				
	6	Did you use part of your home for business		- D mlom for 20402			
\vdash	7 8	Did you make any contributions to a Keogh or a self-employed SEP plan for 2019?					
	☐ g	Do you pay for any health or long term care insurance through your business? If you or your spouse are self-employed, are either of you covered under an employer's health plan?					
	10	Did you purchase any furniture or equipment for your business?					
	11	Did you make any improvements to your ren					
	12	Did you receive income from raising animals or crops?					
Yes	No 1	Other Deductions Did you use your car on the job (other than	to and from work)?				
\vdash	2	Did you work out of town for part of the year					
	3	Did you incur unreimbursed expenses work	ing as a reservist, perf		asis gov't official?		
\square	4	Did you incur any travel and entertainment expenses for business purposes?					
\mathbf{H}	- 5 6	Did you pay expenses for the care of your child or other dependent so you could work? Did you purchase a 'clean fuel' or electric hybrid vehicle in 2019?					
	 	Did you make energy efficient improvements to your home or purchase any energy-saving property during 2019?					
	8	Did you contribute less than an entire interest in any property to charity?					
\vdash	9	Did you refinance a mortgage or take out a home equity loan during 2019?					
\vdash	11	Did you incur moving expenses during the year due to a military order and incident to a permanent change in station? Did you or your spouse pay any educational expenses for yourselves?					
	12	Did you pay any student loan interest?					
	13	Did you make any federal or state estimated payments?					
\vdash	14	Did you pay alimony?					
	16	Did you donate non-cash donations? Did you donate a vehicle?					
Yes	No	Miscellaneous					
	1	Did you make gifts of more than \$15,000 to any one person?					
	□ 2	Did you engage the service of any household employees?					
\vdash	$\frac{3}{4}$	Did your bank account information change within the last twelve months? Do you want to allocate \$3 to the Presidential Election Campaign Fund?					
	5	Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?					
	6	Did you file Form 8839, Adoption Credit, in a previous year or incur adoption expenses in 2019?					
\vdash	7 8	Did you claim a First-time Homebuyer Credit for a home purchased in 2008? Was there a disposition or change in use of your main home for which you claimed the First-time Homebuyer Credit?					
Voc			your main nome for w	mion you diamied the		ayor Grount.	
Yes	No 1	Return preparation and filing Do you want to e-file your return?					
	2	If you are due a refund, how do you want to	receive it?				
		Check sent to you in the mail		Other quick re	fund via a bank pr	oduct	
		Apply to next year's estimates					
		Direct deposit (please provide voide	ed blank check)	Type of account:	Checking	Savings	
		If you owe taxes, how do you want to pay th	nem?				
		Paper check sent with my return	Credit card	Installment Ag	reement		
		Direct debit (please provide a voide		Type of account:	Checking	Savings	
Ш	3	3 Do you want to allow your tax preparer to discuss this year's return with the IRS? If no, enter another person (if desired) to be allowed to discuss this return with the IRS:					
			Phone Personal identification Number Number (5 digit PIN)				

Name	SSN
Comments	·

Organizer Options 1 Appointment Information Date: Day: Time: 2 Miscellaneous X Check ("X") to SUPPRESS Social Security Numbers throughout this organizer. Check ("X") to display detail sheets for input/adjustment purposes for those marked below with an asterisk. 3 Printing Check ("X") to include **Enter # of additional** in printed Organizer blank pages to print X Mailing Slip X Comments Estimated Payments* Pension* Foreign Employer Compensation & Pension* Interest/Dividends (Combined)* $\mathsf{Dividends}^{\star} \ldots \ldots \ldots \ldots \ldots \ldots$ Savings Bond Exclusion* Alimony **Business Assets Business C-EZ*** Business C-EZ Vehicle Business* Business Exp* **Business Vehicle** Home Office* Sale of Capital Assets (Enter # of copies to print) Rent Royalty* Rent Royalty Exp* Rent Royalty Vehicle Farm Rental* Farm Rental Exp* Farm Rental Vehicle Farm* Farm Exp* Farm Vehicle Social Security RRB Misc Inc and Ded Report Child Income* IRA and Other Contribution Medical and Dental Tax Paid Interest Paid Employee and Other Misc Non-Cash Charity (Enter # of copies to print) Employee Expenses* Employee Expenses Vehicle Child Care* Adoption Expenses* Tip Income Household Help*