SOULENCE™

Instructions for Individual Tax Organizer

Please refer to the information below for clarification on any specific section. This instruction sheet is organized in the same order as your organizer. We will not provide clarification for things we feel are self explanatory (i.e. name).

(1)Personal Information

New Clients—Please fill in all the boxes in this section. This is information we will need to receive from you in one form or another. We find this method the most efficient.

Past Clients—If we have done your 1040 individual tax return before, please just fill in your name so we can match the numbers with your information. We have the other information on file.

US Citizen—Please check the box if you are a citizen.

(2)Dependents (Children and Relative)

Fill in this part with the information of any dependent you are claiming on your taxes.

A qualifying child needs to be under 19, lived with you half the year, and you provided more than half of the child's support.

A qualifying relative needs to have lived with you or be related to you, is supported more than 50% by you, and did not have more than $3,400 in gross income.

If you have questions about whether you can or cannot claim someone, we can help clarify.

New Clients—Please fill in all the information for all dependents.

Past Clients—Please fill in all the information for dependents that you did not claim last year and fill in just names of those you claimed last year and will claim this year.

(3)Income

We feel this section is self explanatory. The only thing we want to add here is that if you receive a 1099-B or something from your stock broker, and you sold shares of stock, you need to know NOT all forms report all the important information. Many brokers do not report to you the details of the purchase on your sold shares. In other words, they report how many shares of what stock on which date for what amount. They do not always tell you what you originally paid for those shares and when you bought them. The purchase information is VERY important in lowering your taxable income. Please make sure we receive the purchase details on the stocks you sold.

(4)Deductions

Each subsection is separated. The first part we are asking for personal residence, real estate, vehicle, and boat or trailer taxes you paid. Also the amount you paid last year for tax preparation.

Unreimbursed Job Expenses is money you spent in relation to a W-2 job that you did not get reimbursed for. This is NOT where you put expenses for a business or schedule c.

(5)Other Items

The list provided is not all inclusive. In addition to the items listed on the organizer, please put anything here that we may not have considered or anything you may have questions or concerns about.

(6)Prepaid Tax Payments

If you prepaid taxes to the state or IRS, then please fill in the information appropriately.

If you have any questions about the organizer, instructions, or anything relating to taxes, please email questions@soulence.com.