



2019 Biz Info Organizer (for 2018 Tax Returns)

Return your organizer to: **Ministry Consulting Group**; 107 W Main St; Fulton OH 43321-9702

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Due to changes in the requirements imposed on professional tax preparers we cannot prepare your return if this certification is not signed. Joint returns require both signatures.

Certification

I acknowledge each of the following:

- § 'I', 'me', 'my' herein refers to me and also includes my spouse if I am married, regardless if we file a joint return or separate returns.
- § It is my responsibility to provide all necessary information related to income and deductions for tax year 2018, and to respond to MCG's inquiries in a timely manner so that MCG can accurately complete my returns prior to their due dates.
- § I must send to MCG legible copies of all pertinent tax documents. I will retain the original documents for my files; I acknowledge that MCG will not return any documents other than my completed tax returns unless MCG has agreed in advance to do so.
- § I must use MCG's secure web portal or other secure means to transmit documents containing sensitive, user-identifiable information; I will contact MCG if I need log on credentials for the web portal.
- § I am responsible for maintaining appropriate records, such as official tax documents, receipts and substantiation for deductions, and purchase and sales information for assets. I understand that I must retain these materials for a minimum of four years.
- § It is my responsibility to review my returns before they are filed to ensure that all income has been correctly reported and that I have appropriate substantiation for all deductions and credits claimed. Filing my returns by the due dates is my responsibility.
- § If it becomes necessary due to an error or omission on my part to revise my return(s) after they are delivered to me a revised invoice will be issued to include a revision fee of not less than \$25 plus the cost of any additional schedules and forms.
- § If my returns are later selected for review or audit by a taxing authority, MCG will assist or represent me at an additional fee if I so desire.

I certify that, to the best of my knowledge and belief, the information provided in this *Tax Info Organizer* is accurate and complete and may be relied upon to prepare my income tax return(s) for tax year 2018 and that no material data or information has been omitted.

I further certify and agree that if my name is typed below such typed signature shall serve as my attesting signature and shall be as valid as my handwritten signature.

Please note: if you are preparing this *Tax Info Organizer* on your computer, you are permitted to type your 'signature(s)'.

Signature

Date

Signature

Date

Privacy Notice

At Ministry Consulting Group LLC, we have always protected your right to privacy. Like all providers of personal financial services, we are required by law to inform our clients of our policies regarding privacy of client information.

§ *Types of Nonpublic Personal Information We Collect*

We collect nonpublic personal information about you that you provide to us or that you authorize us to obtain.

§ *Parties to Whom We Disclose Information*

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties but only to the extent that they need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

§ *Protecting the Confidentiality and Security of Current and Former Clients' Information*

We retain records relating to professional services we provide to enable us to better assist you with your professional needs and, in some cases, to comply with legal requirements or professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards. Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

To use this Tax Info Organizer just respond to the statement or question in the left column.

- If it is a *statement* that begins 'Tell us . . .' complete all the parts of that section that apply to you (and your spouse, if filing a joint return).
- If it is a *question* that begins 'Did you . . .' and your response is 'no', click on the 'no' box and skip to next section. If your response is 'yes', click the 'yes' box and complete the parts of that section that apply to you. It's that easy! Be sure to save frequently.
- T = Taxpayer S = Spouse
- Items you need to send to us are highlighted in this orange color

Did you receive self-employment income?

Send one copy of each Form 1099-MISC and 1099-K

Note—some business types may require filing a separate tax return.

No \$ Yes "

If MCG did not prepare your 2017 tax return you **MUST send a copy of the 2017 business tax return(s).**

	Business #1		Business #2		
Biz type	<input type="checkbox"/> Sole proprietor owned by <input type="checkbox"/> T <input type="checkbox"/> S <input type="checkbox"/> LLC— owned by <input type="checkbox"/> T <input type="checkbox"/> S <input type="checkbox"/> LLC— owned by multiple owners (send a list of owners including name, address, SSN, ownership %, and required payments) <input type="checkbox"/> Partnership <input type="checkbox"/> S Corporation <input type="checkbox"/> C Corporation		<input type="checkbox"/> Sole proprietor owned by <input type="checkbox"/> T <input type="checkbox"/> S <input type="checkbox"/> LLC— owned by <input type="checkbox"/> T <input type="checkbox"/> S <input type="checkbox"/> LLC— owned by multiple owners (send a list of owners including name, address, SSN, ownership %, and required payments) <input type="checkbox"/> Partnership <input type="checkbox"/> S Corporation <input type="checkbox"/> C Corporation		
Business name					
Address (if other than home address)					
Primary business product or service					
Federal ID# (if other than your SSN)					
Accounting method	<input type="checkbox"/> Accrual <input type="checkbox"/> Cash		<input type="checkbox"/> Accrual <input type="checkbox"/> Cash		
Did you materially participate in this biz?	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		
In what year did you start this business?					
Did you issue Form 1099 to anyone?	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		
To prove to the IRS this biz is legitimate which of these you have:	<input type="checkbox"/> Separate bank acct <input type="checkbox"/> Biz cards <input type="checkbox"/> Biz stationary <input type="checkbox"/> Biz license <input type="checkbox"/> Ads/marketing <input type="checkbox"/> Sales tax returns		<input type="checkbox"/> Separate bank acct <input type="checkbox"/> Biz cards <input type="checkbox"/> Biz stationary <input type="checkbox"/> Biz license <input type="checkbox"/> Ads/marketing <input type="checkbox"/> Sales tax returns		
To prove to the IRS this biz is legitimate which of these do you keep:	<input type="checkbox"/> Accounting records <input type="checkbox"/> Paid invoices <input type="checkbox"/> Biz log books <input type="checkbox"/> Paid receipts <input type="checkbox"/> Biz ledgers <input type="checkbox"/> Biz bank statements		<input type="checkbox"/> Accounting records <input type="checkbox"/> Paid invoices <input type="checkbox"/> Biz log books <input type="checkbox"/> Paid receipts <input type="checkbox"/> Biz ledgers <input type="checkbox"/> Biz bank statements		
Did the biz have any interest in a foreign bank acct any time during the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		
Biz use? Check & complete biz use below	<input type="checkbox"/> Vehicle <input type="checkbox"/> Office in your home		<input type="checkbox"/> Vehicle <input type="checkbox"/> Office in your home		
Were any depreciable items sold or purchased during this tax year? <input type="checkbox"/> No <input type="checkbox"/> Yes—provide complete details (do not include depreciable purchases below)					
Record only biz-related amounts	Biz #1	Biz #2	Record only biz-related amounts	Biz #1	Biz #2
# of Forms 1099-MISC received			Biz mortgage interest expense		
# of Forms 1099-K received			Other business interest expense		
Total on Forms 1099 MISC & 1099-K			Legal/professional services		
Other income NOT on Form 1099			Office costs		
Returns & allowances			<i>Includes dues, fees, subscriptions, bank fees, postage, phone, printing, internet service, computer software, office supplies, etc</i>		
Other business income			Vehicle or equip lease expense		
Biz bad debts (accrual only)			Other biz rent or lease expense		
Beginning inventory value			Repairs & maintenance expense		
Inventory purchases			Supplies expense		
Labor to produce inventory			Taxes and licenses expense		
Inventory materials & supplies			Out-of-town travel expense		
Ending inventory value			Business meals expense		
Ending inventory is valued at cost	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Business property utilities expense		
Advertising expense			Req'd payments to S Corp members		
Commissions expense			Req'd payments to LLC members		
Contract labor expense			Pension & profit-sharing expense		
Employee benefits					
Biz insurance (other than health)					

<p>Did you receive income from rental property?</p> <p>Send one copy of each Form 1099-MISC and 1099-K</p> <p><input type="checkbox"/> No \$ <input type="checkbox"/> Yes "</p> <p>If MCG did not prepare your 2017 tax return you MUST send a copy of the 2017 Schedule E and depreciation schedule(s).</p>		Property #1		Property #2				
	Organized as an LLC or partnership?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No			
	Street address							
	City State Zip							
	Owned by	<input type="checkbox"/> TP	<input type="checkbox"/> SP	<input type="checkbox"/> Joint	<input type="checkbox"/> TP	<input type="checkbox"/> SP	<input type="checkbox"/> Joint	
	Month/year first used as a rental property	Mo	Year		Mo	Year		
	Did you actively participate in managing this rental?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		<input type="checkbox"/> Yes	<input type="checkbox"/> No		
	Did you issue Form 1099 to anyone?	<input type="checkbox"/> Yes	<input type="checkbox"/> No		<input type="checkbox"/> Yes	<input type="checkbox"/> No		
	# days rented during tax year/# days used by you/family member	/		/				
	Original cost plus cost of major improvements							
	Value of land in the amount on the previous line							
	No rental income was received for this property	<input type="checkbox"/>		<input type="checkbox"/>				
	Rental income reported on Form 1099-MISC							
	Rental income not reported on Form 1099-MISC							
	Old deposits and fees converted to rent income							
	Advertising expense							
	Cleaning & maintenance expense							
	Insurance							
	Management expense							
	Mortgage interest expense							
	Repairs expense							
	Real estate tax expense							
	Utilities expense							
	Improvements							
	Other:							
Other:								
Other:								
Other:								
Rental biz use of personal vehicle or home office: check here & complete biz use below	<input type="checkbox"/> Vehicle <input type="checkbox"/> Home Office		<input type="checkbox"/> Vehicle <input type="checkbox"/> Home Office					
Were any depreciable items sold or purchased during this tax year?	<input type="checkbox"/> No		<input type="checkbox"/> Yes--provide complete details					
<p>Did you have self-employment or rental use of a personal vehicle?</p> <p>(unreimbursed employee business use is no longer deductible)</p> <p><input type="checkbox"/> No \$ <input type="checkbox"/> Yes "</p>	Complete ALL questions below							
	Do you have <u>written</u> records to prove biz use?		<input type="checkbox"/> Y	<input type="checkbox"/> N	Is another vehicle available for personal use?		<input type="checkbox"/> Y	<input type="checkbox"/> N
	Vehicle: Year & make	Vehicle #1		Vehicle #2		Vehicle #3		
	Orig cost/1 st biz use date	Cost	1 st use	Cost	1 st use	Cost	1 st use	
	Total annual mileage							
	Commuting	Round trip	Annual	Round trip	Annual	Round trip	Annual	
	Please indicate biz miles	T	S	T	S	T	S	
	Job related	Unreimbursed employee business expenses are no longer deductible.						
	Self-employment related							
	Rental income related							
<p>Did you use a portion of your home for self-employment or rental purposes?</p> <p>If the same room is used for multiple biz's/rentals/job usages, it can be claimed for only one—hint: it's best to claim for Biz A or Biz B.</p> <p><input type="checkbox"/> No \$ <input type="checkbox"/> Yes "</p>	<p>For some reason, most people claiming biz use of home leave many of these responses blank. If you claim biz use of home, you must complete ALL questions in this section.</p>						Check first box or list all itemized expenses	
	Please note: unreimbursed employee business expenses are no longer deductible.						Check here if you want to use \$5/sq ft instead of itemizing expenses below. <input type="checkbox"/>	
	Check here to affirm that biz area was used <u>regularly</u> and <u>exclusively</u> for biz purpose <input type="checkbox"/>						Mortgage interest	
	Original cost plus cost of improvements less value of the land						Real estate taxes	
	Daycare only: # days during year daycare provided: # hours/day						Homeowner's insurance	
		Biz 1		Biz 2		Rental		Rent
	Date 1 st used for biz							General repairs
	# of months of biz use							Biz area repairs
	Sq ft whole house			B Enter		B Enter		Utilities
	Sq ft biz use area							General improvements
	# rooms whole house			B Enter		B Enter		Biz area improvements
	# of biz use rooms							Other