

HOPE & LIFETIME LEARNING CREDITS

Please provide information relating to educational expenses if either of these credits appear to apply to you. The Hope Credit is available for education expenses for students in their first two calendar years of postsecondary education. They must be enrolled at least 1/2 time and cannot have been convicted of dealing or possession of illegal drugs. This is available for amounts paid during the calendar year for classes which begin during the calendar year. The Lifetime Learning Credit is available for education expenses for courses beginning after June 30, 1998 for you, your spouse, or your dependent. The Lifetime Learning Credit is available regardless of the number of years of postsecondary education. For both credits, the institution must be one whose programs lead to a recognized educational credential, such as a Bachelor's degree.

Please provide the name of the student, the amount of the tuition paid, the classes taken, and the name of the institution.

CHECK LIST AND CERTIFICATION

Review amounts and details listed in this tax booklet for completeness and include the following items when presenting your information for preparation of your tax returns:

1. This completed Client Organizer
2. The label pages of the tax booklets and envelopes received from the IRS, state and city.
3. All W-2 Forms.
4. Estimated tax forms and mailing envelopes.
5. Partnerships, limited liability companies, joint ventures, S corporations, estate and trust documents.
6. Forms 1099 indicating dividend and interest income.
7. Buy/sell statements to cover stock sales, real estate transactions and installment sales.
8. Copies of sales contracts to determine finance charges.
9. If you are a new client, provide copies of last year's tax returns.
10. Check if payroll reports were filed for household help.
11. Check if you have disability income.
12. Check if you were audited during the past year. Enclose results.

OTHER QUESTIONS OR COMMENTS

Please note any other questions or comments on a separate piece of paper and keep with this booklet.

I have reviewed the information contained in this booklet and to the best of my knowledge it is true, correct, and complete.

(Please Sign) _____

WHEN COMPLETE - MAIL - DROP OFF - OR CALL FOR AN APPOINTMENT.