

Sheltra Tax & Accounting, LLC
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2019
TAX ORGANIZER

Taxpayer Information		Spouse Information	
Last name	<u>Dumont</u>	Last name.....	_____
First name	<u>Nancy</u>	First name	_____
Middle Initial.....	<u>J</u>	Middle Initial.....	_____
Suffix.....	_____	Suffix.....	_____
Social security number	<u>***-**-0942</u>	Social security number	_____
Occupation	<u>Realtor</u>	Occupation.....	_____
Work phone	_____ Ext ... _____	Work phone.....	_____ Ext ... _____
Cell phone	_____	Cell phone	_____
E-mail address.....	_____	E-mail address.....	_____
Date of birth.....	<u>**/**/1973</u>	Date of birth	_____
Address	<u>1241 Taber Hill Road</u>	Apartment number.....	_____
City	<u>Stowe</u>	State.....	<u>VT</u>
Home phone.....	_____	ZIP Code.....	<u>05672</u>
Fax number	_____		

Dependent Information

First name	MI	Social Security Number	Date of Birth	Months Lived with Taxpayer	Child Care Expense
Last name	Suffix	Relationship			
<u>Leila Flanagan</u>	<u>J</u>	<u>daughter</u>	<u>06/04/09</u>		<u>Ø</u>

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees

Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2019 qualified student loan interest..... Ø

Attach Form(s) W-2 – Wages, Salaries, Tips and Other Compensation**Employer Name**

Champlain Valley School District

no longer employed there

2018 Amount

2,150.

Idletyme Brewing Company LLC

2019 \$1,586.70

4,580.

See Wages, Salaries, Tips and Other Compensation

2,647.

Attach Form(s) 1099-R – Distributions from Pensions, Annuities, Retirement, Profit-Sharing, IRAs, etc**1099-R Payer Name**

Vermont Municipal Retirement System

2018 Amount

1,177.

Attach Form(s) SSA-1099 – Social Security/Railroad Benefits**Taxpayer****Spouse**

Social Security Benefits from Form SSA-1099

Railroad Retirement Benefits from Form RRB-1099

Medicare B premiums withheld

Medicare C premiums withheld

Medicare D premiums withheld

Attach Form(s) 1099-MISC – Miscellaneous Income**1099-MISC Payer Name**

New England Landmark Realty, Ltd

fall Spera Realtors 2019

(no longer with NELR)

Attach Form(s) 1099-INT – Interest Income**1099-INT Payer Name**

Ø attached

2018 Amount**Attach Form(s) 1099-DIV – Dividend Income****1099-DIV Payer Name**

Ø

2018 Amount**Attach Form(s) 1099-B, 1099-S – Sales of Stocks, Bonds, Real Estate, etc**

Attach all stock sale transaction information, including initial cost information.

Other Government Forms to attach:

Form(s) 1099-G – Certain Government Payments, Schedule K-1s – Partnership, S-Corporation, Trust or Estate Income, Form(s) W-2G – Gambling or Lottery Winnings, Form(s) 1099-Q – Payments from Qualified Education Programs

Other Income:

Alimony, jury duty, unreported tips, disability income, etc. Business, rentals, farms: Attach income and expenses for any business, rental or farm you own. Include a list of all new equipment acquired this year, including date of purchase and cost.

Ø alimony/support

Retirement Plan Contributions**Taxpayer****Spouse**

Traditional IRA contributions made for 2019

Roth IRA contributions made for 2019

SEP, Keogh, Individual 401(k) or SIMPLE Contributions

Medical and Dental Expenses	2019 Amount	2018 Amount
Prescription medications.....		
Health insurance premiums	<i>0</i>	
Doctors, dentists, etc		
Hospitals, clinics, etc		
Eyeglasses and contact lenses		
Miles driven for medical purposes.....		
Other medical and dental expenses:		
Assorted medical expenses	<i>To be provided</i>	36.

Taxes	2019 Amount	2018 Amount
Real estate taxes paid on principal residence	<i>3,751.05</i>	3,037.
Real estate taxes paid on additional homes or land		
Auto license registration fees based on the value of the vehicle		
Other personal property taxes		

Interest Expenses	2019 Amount	2018 Amount
Home mortgage interest paid — Attach Form(s) 1098.		
Lender's Name		
Wells Fargo Bank N.A.	<i>9,668.72</i>	9,937.
Points paid on loan to buy, build or improve main home		
Lender's Name	2019 Amount	

Cash/Check/Credit Contributions	2019 Amount	2018 Amount

Noncash Charitable Contributions	2019 Amount	2018 Amount
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.		

Miscellaneous Deductions	2019 Amount	2018 Amount
Union and professional dues	<i>0</i>	
Professional subscriptions, books, supplies	<i>To be provided</i>	
Uniforms and protective clothing (including cleaning)	<i>" "</i>	
Job search costs	<i>0</i>	
Taxpayer educator expenses.....	<i>0</i>	
Spouse educator expenses.....	<i>0</i>	
Tax return preparation fees	<i>\$450</i>	
Safe deposit box rental	<i>0</i>	
Gambling losses (to the extent of gambling income)	<i>0</i>	
Other expenses (list):		

	Yes	No
1 Did a lender cancel any of your debt in 2019? (Attach any Forms 1099-A or 1099-C).....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Did you make energy efficient improvements to your home or purchase any energy-saving property during 2019? If yes , please attach details..... <i>Heat pump invoice attached</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Did you purchase a motor vehicle or boat during 2019? If yes , attach documentation showing sales tax paid.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 Did you purchase a hybrid or electric vehicle in 2019? If yes , enter year, make, model, and date purchased:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Did you donate a vehicle in 2019? If yes , attach Form 1098C.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 What was the sales tax rate in your locality in 2019? % State ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Did your marital status change during 2019? If yes , explain:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Were you or your spouse permanently and totally disabled in 2019?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Do you have dependents who must file?.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Do you have children who are under age 19 or a full time student under age 24 with investment income greater than \$2,200?...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 Did you provide over half the support for any other person during 2019?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 Did you incur adoption expenses during 2019?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 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 within 60 days of the distribution?.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 Did you receive any disability payments in 2019?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Did you receive tip income not reported to your employer?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
16 a Did you buy, sell, refinance, foreclose or abandon a principal residence or other real property in 2019? If yes , attach closing or escrow statements, 1099-C or 1099-A forms.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If you sold a home, did you claim the First-Time Homebuyer Credit when you purchased it?.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
17 Did you incur any casualty or theft losses during 2019?.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
18 Did you incur any non-business bad debts?.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
19 Did you pay any individual for domestic services in 2019?.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20 Did you buy or sell any stocks or bonds in 2019?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
21 Did you use the proceeds from Series EE or I U.S. savings bonds purchased after 1989 to pay for higher education expenses?..	<input type="checkbox"/>	<input checked="" type="checkbox"/>
22 Did you incur any moving expenses? If yes , attach details.....	<input type="checkbox"/>	<input checked="" type="checkbox"/>
23 Did you receive any income not included in this Tax Organizer?..... <i>Income from property mgmt attached</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If yes , please attach information.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
24 Do you expect your income and deductions in 2020 to be the same as 2019? If no , attach explanation of changes expected.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
25 Did you receive Form 1095-A (Health Insurance Marketplace Statement)? If so, please attach..... <i>Medicaid form</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
26 At any time during 2019, did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
27 If you paid any alimony, enter recipient's SSN: _____ Alimony paid: _____		
28 Enter your state of residence..... Taxpayer _____ Spouse _____		

Electronic Filing and Direct Deposit of Refund

	Yes	No
If your tax return is eligible for Electronic Filing, would you like to file electronically?.....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Internal Revenue Service is able to deposit many refunds directly into taxpayers' accounts.		
If you receive a refund, would you like direct deposit?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
If yes , please provide a voided check (not a deposit slip) if your bank account information has changed.		
What type of account is this?..... Checking <input checked="" type="checkbox"/> Savings <input type="checkbox"/>		

Estimated Tax Paid

Federal		State			Local		
Date	Amount	Date	Amount	ID	Date	Amount	ID

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

I formed an LLC for my property management business, Spaw Worries, LLC

Additional information from your ORG Short Organizer: Tax Organizer**ORG Short Organizer: Tax Organizer****Wages, Salaries, Tips and Other Compensation****Continuation Statement**

Employer name	Wages prior year
Baraw Enterprises, Inc	1,976.
Trapp Family Lodge Inc	365.
VR US Holdings II, LLC	306.
Total	2,647.