

## Tax Organizer Checklist

While gathering the Tax Data to begin Your Tax Return Preparation, please review and follow the checklist we have prepared for you.

The completeness of the information provided to us will expedite the preparation of Your Tax Return on time.

### *Income*

- All W-2s
- Interest & dividends (Forms 1099-INT, 1099-DIV)
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- Rents & royalties
- Sale of personal residence/property (Final Closing Escrow Statements at the time of Purchase & Sale)
- Sale of stocks (Form 1099-B Proceeds From Broker Transactions)
- Pension and annuities
- Unemployment compensation
- Social Security Benefits
- Business / Partnership / Other Income (K-1's)
- State and local income tax refunds
- Gambling and lottery winnings

### *Deductions and Credits*

- Tax Return preparation fees
- Medical expense
- Home mortgage interest (Form 1098- Mortgage Interest Paid)  
(If SOLD and/or PURCHASED a House - Final Closing Escrow Statement is required)
- Investment expenses (Margin interest)
- Charitable contribution
- Child care expenses (Provider's name, address and Tax ID number)
- Job-seeking expenses
- IRA & Keogh/SEP plan contribution
- Expenses for business use of car
- Real Estate Property / State taxes
- Personal Property Taxes (Car registration)
- Moving Expenses
- Educational Expenses (Amounts, Eligibility-Form 1098-T )
- Student Loan Interest paid

### *New Clients*

- Bring Social Security Cards for all Family Members
- Bring a List of DOB for each Family Member
- Bring your Last Year's Tax Return to be reviewed , including all the original documents used for Tax Preparation.