



TAX RETURN ORGANIZER

PERSONAL INFORMATION

Full Name (Taxpayer)	
Spouse Name (If Applicable)	
Address:	
Telephone Number:	
Email:	
Job Title:	

APPOINTMENT DATE & TIME: _____

Please bring the following information if it applies to you:

- Driver's License, Social Security Card and Birth Certificates for all those on your tax return
- All Copies of W-2's and any 1099 Income Reporting Statements, including interest from savings, gambling winnings, prizes, awards, etc.
- All forms reporting Pension and Social Security Benefits
- Any 1099's or other document stating "Important Tax Information enclosed"
- Worksheets summarizing business or rental income and expense
- All mortgage interest statements, including any refinanced or paid off
- Escrow Settlement Statement for property bought or sold
- Student Loan Interest Statement
- Form 1095-A, 1095-B, or 1095-C Health Insurance Coverage
- Last Year's Tax return for New Clients

MEDICAL EXPENSES

MISCELLANEOUS

OTHERS NOT LISTED

	Miles		Union Dues		
	Prescription Drugs		Tax Prep Fee		
	Insurance Premium		Education Expenses		
	Doctor Visits		Job Seeking Expenses		
	Dentist Visits		Professional License		
	Hospital Expenses		Journals-Magazines		
	Glasses		Safety Equipment		
	Hearing Aids		Tools/Supplies		
			Safe Deposit Box		
			Investment Expenses		

			Uniform Costs		
TAXES			Business Mileage		
	Payments to State		Business Travel		
	Real Estate		Business Meals		
	Time Share	MISCELLANEOUS		INTEREST PAID	
	Personal Property		Moving Expenses		Home Mortgage
	Auto License-DMV		Charitable Contributions		
	Other:		Gambling Losses		

MISCELLANEOUS IMPORTANT INFORMATION

Sales Tax: Please know amount of sales tax paid on major purchases (autos, watercraft, motorcycles, etc.)

Home Purchase or refinance: Please bring Closing Settlement Statements from Escrow

Child Care: Please provide Name, Address, Phone Number, Social Security Number or Federal ID Number, and the amount paid for the Child Care provided

Education; All qualifying educational expenses for yourself, spouse, or dependents

Direct Deposit: Bank Name, Routing Number, Account Number, and indicate savings or checking account

Solar Costs: If you've had solar panels installed through a purchase option (not a lease option), please bring receipts, purchase agreement, or cancelled check/credit card/loan statements.

Electric Vehicle: If you've purchased a qualified electric vehicle, please bring the purchase agreement with tax credit certificate.