Tax Organizer

Client Name: ____________________ Cell: ________________ Email: ___________________________

*Social Security Number(s):*____

Current Address: ____

For new clients: *How did you hear about us? Circle or fill in.*
Road sign *Google/Website* *Social Media* *Referred by:* ______________________

Directions: Please complete this checklist and include it with your tax documentation. This document is extremely important for us while completing your tax returns. Failure to complete and include with your documents may lead to inaccuracy and delays in completing your tax returns.

Yes No

1. Please List out all Dependents that you claim on your taxes. Add additional Dependents on a separate page.

   Name:
   Date of birth:
   Social Security #:

   Name:
   Date of birth:
   Social Security #:

   Name:
   Date of birth:
   Social Security #:

   Name:
   Date of birth:
   Social Security #:

2. Did you receive an Identity Protection PIN?
   If yes, please include with your paperwork.

3. Did you reside in more than one state?
   If yes, which states and when were you in each state?

4. Driver's License information:

   Client Name: Driver's License #: Date of birth:
   State Issued: Date Issued: Expiration Date:

   Spouse Name: Driver's License #: Date of birth:
   State Issued: Date Issued: Expiration Date:

4a. In order to increase communication with our clients we are updating our contact records. Please provide the information below if you feel comfortable to do so:
   Current Phone Number: Do you accept text messages? Yes No
   Current Email Address:

5. Would you like your refund to be directly deposited into your bank account? If yes, we need:
   Bank Name: Account Type: Checking *OR* Savings (circle one)
   Routing #: Account #:

6. Have you received all your W2's? Please include with your paperwork.
   Please list all employers you had during the year:

7. Did you use your vehicle on the job other than commuting to work?
   If yes, please include mileage for the year.

8. Did you work out of town anytime this year?
   If yes, please explain and include total expenses.

9. Did you earn income from a state other than the one you lived in?
   If yes, please list the state(s) and total income earned.

10. Did you or your spouse receive any tips not reported to you or your spouse's employer?
   If yes, please list the amount.

11. Did you receive any unemployment income this past year?
   If yes, please explain and include 1099G.

Date Received by BH: ___________

12. Did you cash any US Savings Bonds?
If yes, please list the amount(s) and date cashed.

13. Did you or your spouse "roll-over" a profit sharing or retirement plan distribution into another plan?
If yes, please include the details and amounts.

14. Did you receive a schedule K-1 from a partnership, S-Corp, or Trust?
If yes, please include documentation.

15. Did you receive any Social Security benefits?
If yes, please include form SSA 1099R.

16. Did you receive any prize, award, or gambling winnings (including sports gambling)?
If yes, please include form W-2G or 1099.

17. Did you receive any combat, jury duty, or alimony payments?
If yes, please include details and amounts.

18. Did you sell any stock(s)?
If yes, please include the dates, amounts, and any DIV/INT 1099 forms you have received.

19. Did you incur any medical expenses this year? If yes, please include list of expenses with totals.
If you had government marketplace insurance, we must have the 1095A form.

20. Did you move this year?
If yes, when did you move?
What is your new address? (please include street, city, state, and zip)
What moving expenses did you incur?

21. Did you buy or sell a house or property?
If yes, please include Settlement Statement.

22. Did you take out any new loans this year?
If yes, please include documentation.

23. Did you or your spouse make any IRA contributions?
If yes, please include documentation.

24. Did you pay any estimated taxes? If yes, include the dates and amounts for each.
Federal:
State:
City:
School District:
Other:

25. Did you donate any cash or goods to a charity or church?
If yes, include the NAME of the organization and TOTAL VALUE donated. (See the attached Valuation Guide to determine values of donated goods.)

26. Did you pay any college tuition or continuing education expenses?
If yes, please include receipts with totals.

27. Did you incur any childcare expenses this year? If yes, please include an itemized list with totals.

28. Did you work from home and not in the city of your employer?

29. Did you hire someone to work for you that you were required to issue 1099s to? Did you issue these 1099s?

30. Did you make any energy saving improvements to your home? Please provide all related documentation if so.

31. Did you pay any student loan interest?
If yes, please include 1098-E forms.

32. Are you or your spouse being claimed as a dependent by someone else? If yes, please explain:

Tax Document Order

Here is a list of potential documents we'll need from you to complete your tax return efficiently. Depending on your stage of life, you may or may not have certain documents (i.e., if you're not receiving Social Security benefits, then you will not have an SSA form). Your Tax Prep Checklist will help you to include the documents most easily forgotten. As a reminder, please total all your numbers for us. If you bring us a stack of receipts or a sheet with just a bunch of numbers, we will have to invest time into totaling them up which will increase the cost of your tax return preparation fee.

I'm Bringing…	Type of Document
☐	New Dependents' Social Security # and DOB
☐	IRS Notices
☐	Employment Income – W-2
☐	Distributions (annuities, profit-sharing, retirement, IRAs, insurance contracts, pensions) – 1099R
☐	Interest Income – 1099-INT
☐	Interest Dividends – 1099-DIV
☐	State Refunds
☐	Certain Government Payments – 1099-G / Unemployment Income
☐	Misc Income – 1099-MISC / 1099 NEC
☐	K-1 (From a trust, partnership, or corporation)
☐	Rental Income and Expenses
☐	Social Security Income – 1099-SSA
☐	Health Care Coverage – 1095
☐	Medical Expenses (with totals)
☐	Real Estate Tax
☐	Mortgage – 1098
☐	IRA / Retirement Contributions – 5498
☐	Charity Contributions (with totals)
☐	Tuition – 1098-T
☐	Childcare Expenses
☐	Estimated Tax Payments made
☐	If you bought or sold a house we will need the HUD Settlement Statement from the closing
☐	Receipts from energy saving improvements to your home.
☐	Student Loan Interest - 1098-E