INDIVIDUAL TAX ORGANIZER

Startup Checklist

If we did not prepare your prior year returns, please provide a copy of your federal and state returns for the previous year.

Taxpayer's Name _____ Social Security Number _____ Occupation _____

Spouse's Name _____ Social Security Number _____ Occupation _____

☐ Single ☐ Married, Filing Jointly ☐ Married, Filing Separately

Home Address _____ Cash or Accrual _____

City _____ County _____ State _____ Zip Code _____ School District _____

Telephone Number (Taxpayer)

Office _____

Cell _____

Home _____

Email _____

Date of Birth _____

Blind YES _____ NO _____

Telephone Number (Taxpayer)

Office _____

Cell _____

Home _____

Email _____

Date of Birth _____

Blind YES _____ NO _____

Dependent Children Who Live With You:

Full Name	Social Security Number	Relationship	Birth Date

Other Dependents Who Live With You That Are NOT Your Children:

Full Name	Social Security Number	Relationship	Birth Date	# Months Residing in Your Home	% Support Furnished By You

Items to Provide

Please answer the following and provide supporting documentation for any question answered "Yes".

Done	N/A		
☐	☐	**1.**	W-2 (Salaries, Wages)
☐	☐	**2.**	1099-B (Brokerage Sales)
☐	☐	**3.**	1099-G (Unemployment, Gambling/Lottery Winnings, State & Local Tax Refunds)
☐	☐	**4.**	1099-R (Pensions, Annuities, Retirement Plan Distributions)
☐	☐	**5.**	1099-S (Sale of your home or other real estate)
☐	☐	**6.**	1099-SA (HSA, MSA Distributions)
☐	☐	**7.**	1099-DIV (Dividends)
☐	☐	**8.**	1099-INT (Interest)
☐	☐	**9.**	1099-MISC (Miscellaneous Income)
☐	☐	**10.**	1099-OID (Interest)
☐	☐	**11.**	1098-E (Student Loan Interest)
☐	☐	**12.**	1098-T (Tuition Statement)
☐	☐	**13.**	1098-INT (Mortgage Interest)
☐	☐	**14.**	5498 (IRA Contribution Statement)
☐	☐	**15.**	Schedules K-1 (Forms 1065, 1120S, 1041)
☐	☐	**16.**	Annual Brokerage Statements
☐	☐	**17.**	Jury Duty Pay
☐	☐	**18.**	Alimony Received
☐	☐	**19.**	8886, Reportable Transactions
☐	☐	**20.**	Form HUD-1 for Real Estate Sales/Purchases
☐	☐	**21.**	Other Tax Information Statements
☐	☐	**22.**	Sole-Proprietorship Income and Expenses

Items to Provide

Please answer the following questions and provide supporting documentation for any question answered "Yes":

Y	N		
☐	☐	**1.**	Did you receive income from any legal proceedings, cancellation of student loans or other indebtedness during the year?
☐	☐	**2.**	Did any of your dependents have income of $950 or more? ($400 if self-employed)
☐	☐	**3.**	Did any of your children under age 19, age 24 if they are a full-time student, have investment income over $1,900? If yes, would you like to include it on your return?
☐	☐	**4.**	Did you make any estimated tax payments?
☐	☐	**5.**	Did you make any gifts during the year directly or in a trust exceeding $14,000 per person?
☐	☐	**6.**	Did you have any childcare expenses?
☐	☐	**7.**	Did you have any casualty or theft losses during the year?
☐	☐	**8.**	Are any dependent children married and filing a joint return with their spouse?
☐	☐	**9.**	Did any dependent child 19-23 years of age attend school full-time for less than 5 months during the year?
☐	☐	**10.**	Did you have any rental properties?
☐	☐	**11.**	Did you have income from, more than one state during the year?
☐	☐	**12.**	Did you make any large purchases or home improvements?
☐	☐	**13.**	Did you acquire any interests in partnerships, LLCs, S corporations, estates or trusts this year?
☐	☐	**14.**	During this year, do you have any loans or credit cards that became uncollectible or securities that became worthless?
☐	☐	**15.**	Did you have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms?
☐	☐	**16.**	Did you realize a gain on property which was taken from you by destruction, theft, seizure or condemnation?
☐	☐	**17.**	Did you start or already have a business during this year?
☐	☐	**18.**	If you had a Series EE U.S. savings bonds purchased after 1989, did you use the proceeds to pay for higher education expenses?
☐	☐	**19.**	If you were to receive a federal or state refund would you want it deposited directly into your bank account? If yes, please enclose a voided check.
☐	☐	**20.**	Has the IRS, or any state or local taxing agency, notified you of changes to a prior year's tax return? If yes, provide copies of all notices or correspondence received.
☐	☐	**21.**	If you are an educator, did you have unreimbursed work-related expenses?