

Income Tax Organizer/ Checklist

	Copy of previous year tax return									
	Date of Birth and SS # of everyone on tax return									
	Did your marital status change since prior tax return?									
	Do you have more, less or same dependents since last tax return?									
	Address if different than previous tax return									
	Phone number to use for tax return, text and discussions with preparer									
	For Refunds: Bank Account for Refund or amount owed. Routing and Account number or cancelled check.									
	For year 2018 & prior years: Did you have health insurance to cover everyone on this tax return for the year?									
	If so, I need your form 1095 that you need to get from your insurance carrier...									
Income:	W-2s from Job(s)									
	1099R for Retirement Income or withdrawal									
	SSA Form for Social Security Income									
	1099s for interest, dividends, and any other income									
	Total Income from your records									
	Estimated Tax paid for current year tax:									
	Amount & date paid									
	Did you pay mortgage interest for your residence?									
	If so, do you know if you paid enough to itemize deductions in prior year?									
	If so, see itemized deduction list									
	Do you have a business? If so see business organizer list									
	Do you have rental property? If so see rental income organizer list									
	Do you pay for child care so you can work or go to school? If so see child care information list									
	Do you sell any real estate or other property during this year? If so see list of real estate sales									