“ACCOUNTING TODAY FOR TOMORROW’S FUTURE”

Personal Tax Client Organizer

❑ Social Security Cards & Date of Birth for ALL Filers & Dependents

❑ Current Driver’s Licenses for all taxpayers on return

❑ Current Mailing Address, Phone Numbers, and email addresses for all taxpayers

❑ Current Occupation for all taxpayers

❑ 1099’s including retirements, pensions, government issued

❑ 1098 Mortgage Interest Statements

❑ 1095-A if utilizing Healthcare.gov for health insurance

❑ W-2’s

❑ 1098-T – Student Loan Interest Statements

❑ 1099-INT or 1099-DIV – Brokerage Statements

❑ Childcare Expenses – *Must have statement, including Tax ID*

❑ Copy of prior year’s Tax Return

❑ List of any Estimated Tax Payments made for the year

❑ Personal Business (Schedule C) – List of Income & Expenses for 1099 Income

(If you have received a 1099-NEC or have a Personal Business, we can assist you with compiling this list, if you do not already have it available. See additional attachment for assistance)

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