

Client Organizer

For In-Person Interview

Check all that might apply. Checking an option just signals to your preparer that there should be some discussion on this topic.

Personal Info

Topic	Docs/Info Needed
Change of address/phone #	new address/phone #
Married/divorced/widowed during year?	social security #'s, birthdates
If newly married, did either spouse change last name with Social Security	
Did your occupation change?	
Change in dependents	SSN's, birthdates
Change in bank info (if you have refunds dir dep)	acct #, bank's RTN
New job/changed jobs	w-2's
Anyone living with you who is NOT a dependent?	SSN's, birthdates
Are either you or your a spouse a college student?	Tuition & pmt history
Are either you or your spouse disabled?	
Any outstanding tax problems?	All related docs
Do you get your health insurance through Obamacare?	1095-A from healthcare.gov
Do you have a health savings account?	1099-SA, 5498-SA (if rec'd any)
Are you or your spouse any of the following:	
teacher	Educator expenses
public safety officer (of any type)	Health ins pd out of pension
real estate professional (> 750 hrs/yr)	
military or civilian contractor	Moving exps, combat pay
Any non-dependents covered under your health ins?	
Did you receive an inheritance or life ins benefit?	
Other items to note: _____	

Income

Wages	w2 for each job
Took money from IRA or 401k	1099-R for each acct
Sold stocks or bonds	1099 for each acct
Have investment accounts (dividends, interest)	1099 for each acct
Gambling winnings	w-2G, if any
Social security	1099-SSA
Disability income	1099-SSA if SSD
Pension	1099-R for each pension
Unemployment	1099-G
Self-employment income	1099-NEC's, business exps
Foreign income	Income documents
Do you own any rental homes	income and exps
Did you do any roth IRA conversions	1099-R
Alimony	total received/paid
Child support	total received
Distribution from college savings (529 plan)	1099-Q

Deductions/Credits

Mortgage – approx amt owed _____
Property tax – approx amt paid _____
Charity – approx amt donated _____
Medical – approx amt paid _____

Qualified Charitable Distributions from your IRA (over 70 yrs old only)

Student loan interest

Educator expenses

If you have kids under 14

babysitting

latchkey/Sacc/after-school care

summer day-camps

pre-kindergarten tuition

Do they live with you even though someone else claims them?

If you live with elderly or disabled family members

Expenses for visiting nurse

Fees to others for supervision or transportation of elderly/disabled

Do you claim this person as a dependent?

If you or your spouse are disabled

Do you receive a disability pension through your employer?

If so, are you below your employer's minimum retirement age?

Do you receive Social Security Disability

If so, are the payments based on your work history (SSD) or are they based on your income level (SSI)

Did you get a lump sum payment this year

Did you repay any previously-received disability income

Do you receive any other kind of disability payments (e.g. veteran's disability)

Energy-efficiency credits

Did you buy an electric or hybrid vehicle?

Did you install solar equipment at any of your homes or businesses?

Did you make any of the following home improvements to your main residence?

new furnace or water heater

new windows or doors (including doorwalls)

insulation

new high-efficiency water heater