



3974 West 4100 South Suite #C
West Valley City, UT 84120-5450

Tax Organizer Checklist

Personal Information

- Social Security Numbers (for you, your spouse, and dependents)
- Driver's license or state ID (for you and your spouse)

Income Documents

- W-2 forms (wages and salary)
- 1099 forms (e.g., self-employment, interest, dividends, unemployment, retirement distributions)
- K-1 forms (partnerships, S-corporations, estates, trusts)
- Rental income and expenses
- Other income records (e.g., gambling, hobby income, business income)

Deductions & Credits

- Mortgage interest (Form 1098)
- Property tax records
- Medical and dental expense records
- Charitable donation receipts
- Childcare expenses (with provider's EIN or SSN)



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- [] Education expenses (Forms 1098-T or 1098-E)

- [] Retirement contributions (IRA, 401(k))

Other Documents

- [] Last year's tax return (if new client)

- [] Health insurance coverage forms (e.g., 1095-A, 1095-B, 1095-C)

- [] Proof of estimated tax payments (if applicable)

- [] Proof of identity theft PIN (if issued by IRS)

- [] Proof your dependent resided with you throughout the year for dependents you are claiming