



## MCV Individual Tax Organizer

### INCOME

- ☐ W-2 wages / salaries / tips - Attach all W-2s
- ☐ Interest / dividends (bank, brokerage) - Attach 1099-INT / 1099-DIV
- ☐ IRA / pension / annuity distributions - Attach 1099-R
- ☐ Social Security benefits - Attach SSA-1099
- ☐ Capital gains / stock / property / crypto sales - Attach 1099-B / broker statements
- ☐ Self-employment / contractor income - Attach 1099-NEC / 1099-MISC / records ☐ Taxpayer ☐ Spouse

Name of business: \_\_\_\_\_

Name of business: \_\_\_\_\_

Name of business: \_\_\_\_\_

- ☐ Rental / royalties / K-1 income - Attach Schedule E / K-1s
- ☐ New property
- ☐ Unemployment / gambling / alimony (pre-2019) - Attach 1099-G / other docs
- ☐ Other income (jury duty, prizes, etc.)

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### ADJUSTMENTS & DEDUCTIONS

- ☐ Educator expenses - Provide amount
- ☐ Student loan interest - Attach 1098-E
- ☐ HSA contributions - Attach Form 5498-SA / account statements
- ☐ IRA contributions - Attach Form 5498
- ☐ Alimony paid (pre-2019 agreements) - Provide amount + recipient SSN
- ☐ Mortgage interest / property taxes - Attach 1098, receipts
- ☐ Refinanced ☐ Purchase ☐ Sold
- ☐ Medical bills - Attach receipts
- ☐ Charitable donations: ☐ Cash ☐ Non-cash - Attach receipts / donation sheets
- ☐ Donation sheet prepared and signed by organization representative?
- ☐ Business or rental income eligible for QBI deduction - Provide Schedule C / E info

### CREDITS

- ☐ Child tax credit / credit for other dependents - Provide dependents names & SSNs
- ☐ Education credits (college) - Attach 1098-T + payment records
- ☐ Premium tax credit (health insurance marketplace) - Attach 1095-A
- ☐ Other credits (adoption, retirement savings, foreign tax, etc.)

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### PAYMENTS

- ☐ Federal tax withheld - W-2 / 1099 forms
- ☐ Estimated tax payments made - Provide dates + amounts

### BANK INFO (for refund direct deposit)

Routing number: \_\_\_\_\_

Account number: \_\_\_\_\_

### NOTES / OTHER ITEMS

- ☐ Report any unusual income, payments, or situations:

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