

INDIVIDUAL INCOME TAX RETURN ORGANIZER

Taxpayer (T) _____ Spouse (S) _____

Date of Birth (T) _____ Date of Birth (S) _____

Occupation (T) _____ Occupation (S) _____

Address _____

Home Phone _____ Cell (T) _____ Cell (S) _____

Email (T) _____ Email (S) _____ Text _____ yes _____ no

Check and provide forms or documents for the following income:

W-2 _____	1099-DIV _____	1099-MISC _____	SSA-1099 _____
1095-A _____	1099-INT _____	1099-NEC _____	Brokerage Stmt _____
1098-T _____	1099-G _____	IRA Value (T) _____	Energy Credit _____
All K-1s _____	1099-K _____	IRA Value (S) _____	Child Care Credit _____

Check for income from these sources and provide documents:

Estates _____	Alimony/SSN _____	Rentals _____	Capital Gains _____
Trusts _____	Social Security _____	Farms _____	Worthless Stock _____
S Corps _____	Sole Proprietor _____	Barter _____	Foreign _____
Partnerships _____	Exempt Interest _____	Gambling _____	Crypto/Virtual _____
LLCs _____	Debt Cancelled _____	Pensions _____	Hobby _____

Check the deductions that apply and provide documents:

IRA (T) _____	Roth IRA (T) _____	Student Loan Int _____	Alimony/SSN _____
IRA (S) _____	Roth IRA (S) _____	Educator Exp _____	CD Penalty _____
SEP (T) _____	SIMPLE (T) _____	SE Health Ins _____	HSA (T) _____
SEP (S) _____	SIMPLE (S) _____	Tuition & Fees _____	HSA (S) _____

Check the Itemized Deductions (Schedule A) that apply and provide support documents:

Medical _____	RE Tax Home _____	Charity Cash _____
Medical Ins _____	RE Tax Other _____	Charity Non-Cash _____
Medical Miles _____	Mtg Interest _____	Charity Miles _____
LT Care Ins (T) _____	2 nd Mtg Int _____	Investment Int _____
LT Care Ins (S) _____	Line of Credit Int _____	Gambling _____

Check the Tax Credits that apply:

Child Care _____	Education _____	MD 529 Plan _____
Child Credit _____	Energy _____	Foreign Tax _____
		Health Care _____

Estimated Tax Payments for Federal _____ Residence State _____ Other State _____ Local Area _____

Compliance Questions:

Did the Taxpayer refinance their home? _____	Any IRS or state letters received? _____
Does the Taxpayer have any foreign accounts? _____	Foreign accounts over \$10,000? _____
Can the Taxpayer substantiate mileage, travel, and meals? _____	Required Minimum Distributions? _____

Things to consider:

- _____ Update beneficiaries on insurance, investments, and retirement plans.
- _____ Update wills, medical directives, and durable power of attorney.
- _____ Seek advice before starting Social Security payments and retirement plans