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DOCUMENTS GATHERING FOR INDIVIDUAL TAX RETURNS

Client Name: _____ Phone: _____ Email: _____

Formfmt\toclit\A taxinfo

(Please gather **ALL** documents and send over at once)

Any Changes? Filing Status: Y/N Dependents: Y/N Address: Y/N Bank: Y/N

Any Foreign bank accounts: Y/N Any Virtual Currency Transactions: Y/N

New client? We'll need a full copy of your previous year tax returns

_____ All **W-2s** received

_____ **Form 1099S:** All interest & dividends, unemployment, Retirement, Gambling, SSA Forms (FORMS 1099INT/DIV, 1099G, 1099R, W2G, SSA, 1099MISC, 1099NEC, ETC.)

_____ **Deductions:** Home mortgage interest \$ _____ Property tax \$ _____
(write down) Auto tag fees \$ _____ Cash donations \$ _____
 Medical expenses \$ _____

_____ **Sale of Assets:** Stock Sales (1099B), mutual fund, or real estate sales (1099S)

_____ **Home or Small Business:** ask for Organizer to fill out income and all expenses

_____ **Rental Property:** ask for Organizer to fill out income and expenses for each property

_____ Copy of Schedule **K-1s** all pages & MN KS for partnerships and S corporations

Other Information/Documents:

_____ Form 1099-Q for HSA contribution and distribution

_____ Roth or Regular IRA: Y/N How much \$ _____

_____ Form 1098-T for College education expenses

_____ Childcare: Providers' letter showing its name, address, EID or SS# & Amount

_____ Student loan interest paid for the year

_____ Child K1-K12 education expenses summary with organization and class type

_____ Form CRP (Certificate of Rent Paid) from your Landlord

_____ Form 1095A for Medical/Obamacare documents

_____ Foreign Bank Accounts, Foreign Income? Ask for Organizer from us.

_____ Estimated taxes paid: IRS/MN \$ _____; Pay CY estimated taxes: Y/N

_____ Bank Name, Routing#, & Acct# _____

Any question/Notes?

