

2022 1040 Organizer Information Checklist

This is a list of the most common items we'll need to finish your returns. We'll call you if we need anything else.

If printing, please print the organizer on one side of paper only. This way we can properly scan your documents.

We can accept most size **emails with attachments**. Please notify us of attachments by a separate email. We will not open zip files for security reasons.

- ___ **Signed Annual Engagement Letter and Exhibit (MANDATORY)**
- ___ **Completed Taxpayer Questionnaire (MANDATORY)**
- ___ **Signed Consent to Use of Tax Information if not on file (MANDATORY to receive our newsletter)**
- ___ All tax return packets, mailing labels and correspondence sent to you by the various taxing agencies
- ___ All W-2's
- ___ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, cancellation of debt, credit and debit card transactions, etc.
- ___ All 1094 and 1095 forms related to health care transactions
- ___ All income tax information for children if you want us to prepare their required returns
- ___ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid
- ___ Total of charitable contributions, and details for any non-cash contributions over \$500. **All contributions must have receipts.**
- ___ Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)
- ___ If you bought, sold or refinanced real estate, then the 2-page HUD closing statement for each transaction



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- ___ If you sold stock or virtual currency, we need the sales price and basis information if not provided by the broker or on Form 1099
- ___ If you are claiming vehicle mileage as a deduction for business, farm or rental properties, please provide: total miles, commuting miles, and business miles driven
- ___ If you are deducting actual vehicle expenses, please provide: date of purchase (or lease), purchase price (or leased fair value) and all vehicle expenses such as lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.
- ___ Copies of any federal, state or local tax correspondence received during the year
- ___ The dates and amounts paid for **all estimated tax payments** for 2022 and the amount of all refunds, rebates or stimulus payments received
- ___ All legal documents regarding formation, sale or purchase of a business during the year
- ___ All legal documents for divorce decrees
- ___ Voided check (not deposit ticket) for account where refunds should be direct deposited (optional)
- ___ All gambling income and loss records
- ___ **New clients:** copies of prior year federal, state and local returns and depreciation schedules if applicable.

Thank you for the opportunity to provide you awesome service.