

# Simple Tax Organizer

Client's name

To make your tax appointment as easy and painless as possible, complete each applicable section below and bring the selected items to your next appointment with us.

## Tax documents

See what documents apply to you; bring those with you to your appointment.

### Applicable tax documents

All 1099s (for interest, dividends, from brokerage accounts, social security, retirement accounts, unemployment, state tax refund, miscellaneous income)

W-2G (gambling income)

K-1s (partnerships, S-corporations, estates, trusts)

Documents showing student loan interest paid

Documents showing HSA contributions and distributions

1099Q (withdrawals from an education account)

1098T (tuition paid)

1099A or 1099C (abandonment or foreclosure of property, cancellation of debt)

Closing statements on any property purchased or sold

Documents on any other income you received

Legal papers for adoptions, divorce or separation

Tax notices received from IRS or state taxing authorities

Receipts for Arizona Tax Credit donations (if you are not sure, bring them in)

Copy of last year's tax return if not prepared by us

## Tax payments

Complete this section if you make estimated tax payments. Please provide the dates and amounts of payments sent in.

Record any **Federal tax payments** made

Date  \$

Date  \$

Date  \$

Date  \$

Record any **State tax payments** made

Date  \$

Date  \$

Date  \$

Date  \$

# Status update

An easy checklist that helps us understand what we need to discuss with you.

Check if any of the following apply to you

My marital status has changed

My dependents have changed

My spouse and I both work or are students and we paid for dependent care\*

I moved more than 50 miles for a new job\*

I added insulation, energy efficient exterior windows, energy-efficient heating or energy-efficient air conditioning to my primary residence\*

I contributed money to a retirement plan

I have foreign investments or bank accounts

I have previously been denied Earned Income Credit

I paid for education for myself, spouse or dependent

I loaned money to someone with a legal promissory note and it is now uncollectible

*\*Please bring receipts if you checked these items*