



Tax Organizer and Checklist

Name:	First	M.I.	Last	DOB	Phone
Taxpayer					
Spouse					

Email:

Mailing Address: Street, City, State, ZIP

Street: City: State: ZIP:

Marital Status:

- Single/Never Married
- Married Live together in 2023?
- Divorced Date:
- Widowed Date:

Please check if applicable:

- US Citizen?
- Blind?
- Permanently and totally disabled?
- Full-time student?
- Can you be claimed as a dependent?

Taxpayer Spouse

-
-
-
-
-

Dependent Information:

First Name	M.I.	Last Name	DOB	Relationship	Months in home	Disabled?	Student?
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>

Identification:

- I have included copies of Photo Identification for Taxpayer and Spouse.
- I have included copies of SS cards, ITIN letters, or similar document for everyone listed above. Prior year tax return including untruncated SSN/ITIN for everyone works instead of SS cards.

Refund or Payment Due:

Bank	Routing #	Account #	Checking?	Savings?	Debit?	Deposit?	% or \$
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Healthcare Information:

- I purchased insurance on Healthcare.gov or state marketplace and included my Form 1095-A

Income Information:

- I have income from work performed as an employee. Include W-2s or [Form 4852](#) for all jobs
- I have income from working that wasn't on a tax form, such as tips. Include records of amounts
- I received scholarships. Include Forms 1098-T, W-2, 1099-Misc, or 1099-NEC.
- I received interest or dividends. Include Forms 1099-INT, 1099-DIV, or other records
 - Some of the interest was from US treasury or municipal bonds. Include records
- I received a state/local tax refund **AND** I itemized deductions for the year the refund was for. Include Form 1099-G and tax return.



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- I received alimony/spousal maintenance payments from a pre-2019 agreement. Include records.
- I received self-employment/contractor income. [Complete Self-Employment Organizer.](#)
- I received payment for work not reported on a tax form. Include records and descriptions
- I owned or started a business this year. [Complete Self-Employment Organizer](#)
 - Business was ongoing and I have included prior year return
- I sold stocks, bonds, real estate, or other property. Include Forms 1099-B, 1099-S, or 1099-A
- I acquired, traded, or sold a Virtual Currency, such as Bitcoin. Include Form 1099-DA/1099-B
- I received disability income. Include records
- I received payments from a retirement account, pension, or annuity. Include Form 1099-R
- I received unemployment compensation. Include Form 1099-G.
- I received Social Security or Railroad Retirement Benefits. Include SSA-1099 or RRB-1099.
- I received Income from rental property. Include records of income and expenses.
- I received a prize, award, or gambling winnings. Include W-2G, 1099-Misc, or other records.
- I received income from a source not listed above. We can discuss how the income should be treated. Please include records or questions relating to the income.

Expense Information:

- I paid alimony/spousal maintenance from a pre-2019 decree.
Include recipient's SSN Recipient's SSN and amount \$ amount.
- I contributed to a retirement account. Include Form 5498 or other records and type of account.
- I paid college or post-secondary education expenses for myself or a dependent. Include Form 1098-T, records of other expenses, number of years attended, and if any educational tax credits have been claimed in prior years.
- (MN Residents) I paid K-12 education expenses for a dependent. Include records of the expenses, grades of the children, and whether they attended private, public, or home school.
- I made student loan payments. Include 1098-E, other records of payments, and student name.
- I had out-of-pocket medical expenses including premiums. [Complete Itemization Organizer.](#)
- I paid state or local taxes such as property or income taxes. [Complete Itemization Organizer.](#)
- I paid mortgage interest on a primary or secondary home. [Complete Itemization Organizer.](#)
- I donated cash or property to charity. [Complete Itemization Organizer.](#)
- I had child or dependent care expenses. Include records, provider EIN, and who received care
- I purchased supplies used in my work as an eligible educator such as teacher. Include records
- I had expenses not addressed above. Include questions and records.



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Events Affecting Taxes:

- I contributed to or received distributions from a Health Savings Account. Include Form 1099-SA, Form 5498-SA, and records of qualifying expenses.
- I contributed to or received distributions from an Education Savings Account. Include Form 1099-Q, Form 5498-ESA, and records of qualifying expenses.
- I filed or had an ongoing bankruptcy during the tax year. Include records relating to bankruptcy
- I had a debt forgiven or cancelled during the year. Include Form 1099-C or 1099-A
- I filed a return with a “capital loss carryover” last year. Include prior year return.
- I lived in a federally designated disaster area. Include records of lost property due to disaster.
- I received the First Time Homebuyers Credit in 2008. Include repayment information
- I made estimated tax payments or applied part of my last year’s refund to this year’s taxes.
- I am a member of a federally recognized Indian tribe.
 - I am living on a reservation.
- I am a member of the US Armed Forces, including reservists.
- I adopted a child. Include records of unreimbursed adoption expenses.
- I have had the Earned Income Credit, Child Tax Credit, or American Opportunity Credit disallowed in a prior year. Include information on why the credit was disallowed.
- I received a letter from the IRS or a state taxing authority. Include the letters you received.
- I have a question about something else not listed above. Please make sure to ask

Foreign Accounts:

- I am a signatory or have a financial interest in an account or asset located outside the US.
 - The aggregate value of my foreign accounts was over \$10,000 during the year.

You may be required to complete a Foreign Banks and Financial Accounts report (FBAR). This form can be filed separately from your taxes and can be found on fincen.gov.
- I received income from a foreign source. Include records of income and where it came from.
- I paid income taxes to a foreign country. Include records of tax paid and which country.