



Dear Customer,

This new Tax Organizer will assist you in collecting the proper form for each item you have, so we can properly prepare your income tax return. **Please review the following checklist and provide us with the information that pertains to your situation.**

<input checked="" type="checkbox"/>	Item	YES	NO	Form to look for																																							
	A copy of your 2021 tax return, if not prepared by this office.			1040																																							
	Form(s) W-2 (Wages Etc.)			W-2																																							
	Form(s) 1099 (Interest, dividends, etc)			1099-B/Int/Div																																							
	Did you spend your HSA? (Find form online as it is rarely mailed)			1099-SA																																							
	Cash Charitable Contributions? Provide List of Donees, amount & a donation acknowledgement or receipt.			LIST																																							
	Non-Cash Charitable Contributions? Click on the link for our spreadsheet!			Noncash spreadsheet																																							
	Own a Partnership, S-Corp, C-Corp, etc.? (#1 cause of extension)			K-1 form																																							
	Do you have mortgage interest and property tax statements?			1098																																							
	Brokerage statements from stock, bond, or other investment transactions			1099-B																																							
	Crypto Currency Gain/Loss Spreadsheet			1099-B																																							
	Did you purchase, Sale or refinance any real estate?			Settlement doc./ALTA																																							
	Do you have new kids or are a fresh empty nester?			No form																																							
	Any Disability, Foreign or other income?			No form																																							
	Did you make any retirement contributions outside of W-2 job?			Account & Amount																																							
	Did you receive any retirement distributions this year? (401(k), IRA, SEP, Etc)			1099-R																																							
	Did you rollover your retirement to a new broker?			1099-R																																							
	Did you receive a distribution from an Education Savings Account or a 529?			1099-Q																																							
	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?			1098-E																																							
	Did you make any tax payments? Bring Proof			Receipt, Print Out, or Cancelled Check																																							
	<table border="1"> <thead> <tr> <th rowspan="2">Federal</th> <th>Date</th> <th>Amount</th> <th>Method (Proof of payment)</th> <th rowspan="2">State</th> <th>Date</th> <th>Amount</th> <th>Method (Proof of payment)</th> </tr> <tr> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Federal	Date		Amount	Method (Proof of payment)	State	Date	Amount	Method (Proof of payment)																																	
Federal	Date		Amount		Method (Proof of payment)	State		Date	Amount	Method (Proof of payment)																																	
	Any Money overseas?			No form																																							
	Rental? Bring a spreadsheet with Rent Revenue + Expenses			Schedule E Spreadsheet																																							
	New Small Business? Bring Spreadsheet with revenue + expenses			1099-N & Schedule C Spreadsheet																																							

Please Note: You will NOT receive our usual paper organizer this year. In the efforts to eliminate excessive use of paper, we are simplifying our organizer and taking advantage of the use of email! If you would still like a paper copy, please contact our office. Also note, we preschedule most non-corporate clients and postcards are mailed with your appointment time.

Sincerely, *WSH*