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## Standard Organizer

### Required Documents

Driver's License, Social Security Card and Birth Dates for everyone on Tax Return
Copies of Birth Certificates, Medical or School Records for Earned Income Tax Credits (EIC)
Health Care Coverage Form 1095-A, 1095-B, 1095-C
All Copies of W-2's and any 1099 Income Reporting Statements, Including Interest from Savings, Gambling Winnings, Prizes and Awards, etc.
All Forms Reporting Pension and Social Security Benefits
1099's Reporting Distributions and Transfers from Retirement Funds
1099's Reporting Unemployment/Paid Family Leave Compensation and State Tax Refunds
1099's Reporting Stock or Bond Sales – Purchase Date and Cost
Worksheets Summarizing Business or Rental Income and Expenses
All Mortgage Interest Statements, including any Refinanced or Paid-Off
Final Closing Settlement Statement for Property Bought or Sold (HUD-1)
Tuition Form 1098-T/Student Loan Interest Form 1098-E
Last Year's Tax Return ( <b>New Client</b> )

Medical Expenses		Interest Paid (Form Required)		Miscellaneous	
\$	Prescription Drugs	\$	1 <sup>st</sup> Home Mortgage	\$	Business Meals
\$	Insurance Premiums	\$	2 <sup>nd</sup> Home Mortgage	#	Business Mileage
\$	Doctor Visits	<b>If Paid To Individual</b>		\$	Business Travel
\$	Dental Visits	Name:		\$	Education Expense
\$	Hospital Expenses	SSN:		\$	Gambling Losses
\$	Glasses	Address:		\$	Investment Expense
\$	Hearing Aids	City, State, Zip:		\$	Job Seeking Expense
\$	Batteries	<b>Contributions</b>		\$	Journals-Magazines
\$	Care Providers	<b>By Cash or Check</b>		\$	Moving Expense (50+ mi.)
\$	Care Facility	\$	Church	\$	Professional License
#	Medical Miles Driven	\$	Other:	\$	Safe Deposit Box
<b>Taxes</b>		\$	Payroll Deduction	\$	Safety Equipment
\$	Payments to State	\$	United Way	\$	Tax Prep Fee
\$	Real Estate	<b>Non-Cash</b>		\$	Tools/Supplies
\$	Time Share	\$	Cancer Society	\$	Uniform Expense
\$	Personal Property	\$	Goodwill	\$	Union Dues
\$	Auto License/Registration	\$	Salvation Army	\$	Other:
\$	Auto License/Registration	\$	Veterans	\$	Other:
\$	Other:	\$	Other:	\$	Other:

\*It is taxpayer's responsibility to retain all documentation supporting the information provided above. We recommend retaining it for 7 years\*

**Home Purchase of Refinance:** Bring Final Closing Settlement Statements from Escrow (HUD-1)

**Child Care:** Name, Address, Phone Number, SS# or FID# and Amount Paid to Child Care Provider

**Education:** IRS Requires Form 1098-T to claim any Qualified Education Credits. Applicable to You, your Spouse and Dependent(s)

**Direct Deposit of Refund:** Required Info: Bank Name, Routing Number, Account Number and Account Type: Checking or Savings