

The Best Way to Organize Your Information

Remember that the speed, accuracy and cost of your tax return(s) will probably depend on the **completeness and organization** of the materials and data you give us. If you are bringing in supporting documentation, here is how you might organize your information:

Pile 1 – Basic Information – **For All Returns**

- Intake Form, completed as well as possible (we can assist, in person, by phone, or online meeting)
- Voided Check
- Current Driver's License
- Health Insurance letter if appropriate (form 1095/1095A)

Pile 2 - Income

- W-2 and 1099 tax documents for all jobs of anyone on the return
- 1099 tax documents for any investment income, insurance distributions, etc.
- Any other tax income documents that you feel may be helpful
- Income from "Alternative Work Sources", such as Uber, Door Dash, Fashion Sharing, Fantasy Sports
- COVID/Stimulus Letter, Form 1444

Pile 3 – Traditional Deductions

- Mortgage Interest tax statement(s)
- Car Registration receipts
- Charitable Donations
- State and Local Taxes
- Contributions to a Traditional (not Roth) IRA
- Medical & Dental Expenses (if they may be over 7.5% of your Adjusted Gross Income)
- Quarterly Tax Payments, amount and date
- Home office information

Pile 4 – Other/Not Sure

- Previous year taxes if this is your first year with us
- Any other documents/statements that have been used for your taxes in the past

When you drop off the above tax information, we will also have you sign a CPA Engagement Letter and a CPA Disclosure for your personal tax preparer.