ALPHA FINANCIAL & TAX

Organizing your Tax Information

Alpha Financial & Tax wants to make sure that your taxes are done accurately and quickly, and we want your tax exposure to be as low as legally possible. This will usually depend on the **completeness and organization** of the materials and information you provide us. Here is how we suggest you organize your tax information for your return:

Pile 1 – Basic Information for all returns

___ Intake Form (We can assist if you'd like)
___ Voided Check
___ Current Driver's License
___ New Clients – Last Year's Tax Return
___ Health Insurance Letter (1095/1095A) if applicable
___ Any other information or documents you have needed in the past

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 employment-related tax documents that you feel are appropriate
___ Income from "Alternative Work Sources" (Uber, Door Dash, Fantasy Sports, etc.)

Pile 3 – Traditional Deductions

___ Mortgage Interest tax statements
___ Home purchase/sale documents if purchased or sold during the year
___ Car Registration receipts
___ Charitable Donations
___ State & Local Taxes paid prior year
___ Medical/Dental expenses (if they may be at least 7.5% of your Adjusted Gross Income)
___ Traditional IRA contribution amounts
___ Quarterly Tax payments, amount & date
___ Home Office information

- *When you submit your tax information, we will also have you sign a Tax Preparation Engagement Letter for your preparer.*
- *Businesses: Check with us for documents we'll require for business taxes*