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*