**Document Checklist**

Thank you for your help in the completion of the Tax Organizer. This will help keep your tax preparation cost from significantly increasing by ensuring we have all required information at the start of preparation. You can upload documentation thru our Intuit Link or please password protect your document before sending thru e-mail.

**Please provide us with the following forms or documentation, if applicable:**

* W-2 (wages)
* 1099-R (retirement)
* 1099-INT (interest)
* 1099-DIV (dividends)
* 1099-MISC (Misc income/Non-Employee compensation)
* 1099-B (brokerage sales, **including cost basis information for investments sold**)
* 1099-G Unemployment
* Annual brokerage statements(that may include 1099-INT, 1099-DIV & 1099-B)
* Schedule K-1 (Forms 1065, 1120S, 1041)
* Form 1098 (mortgage interest)
* Real estate tax receipt, may be shown on mortgage interest statement if paid by escrow
* Form 1095 (health coverage) if marketplace insurance only
* Closing statements pertaining to real estate transactions, including personal residence, purchase or sale (HUD-1)
* Form 1099-K (Merchant Card and Third Party Network Payments)
* Any tax notices received from the IRS or other taxing authorities
* Vehicle/personal property tax receipts (KS: tag renewal/purchase)(MO: annual year end)
* Non cash donation receipts with itemized list of property donated and estimated value
* A voided check for direct deposit/withdrawal
* Any other 1099 or 1098 forms received
* Driver’s License for Taxpayer & Spouse when applicable
* List of foreign bank accounts including address of institution and maximum account balance during year (if aggregate value of accounts exceed $10,000 during year)