

# INDIVIDUAL INCOME TAX

## Document Organizer

**Taxes owed are due by the filing deadline. Any taxes not paid by the April deadline are subject to IRS late payment penalties and interest.**

<b>You</b>	<b>Spouse</b>	<b>Basic Info</b>
<input type="radio"/>	<input type="radio"/>	Name, SSN or ITIN, Date of Birth
<input type="radio"/>	<input type="radio"/>	Dependents-Name, SSN, Date of Birth
<input type="radio"/>	<input type="radio"/>	Last Year's Return <i>(if new client)</i>
<input type="radio"/>	<input type="radio"/>	Last Year's Estimated Taxes Paid
<input type="radio"/>	<input type="radio"/>	Bank Info (Account & Routing # for Direct Deposit or Withdrawal)
<input type="radio"/>	<input type="radio"/>	Prior Year's Self-Select PIN or AGI (Adjusted Gross Income)
<b>You</b>	<b>Spouse</b>	<b>Income</b>
<input type="radio"/>	<input type="radio"/>	Form W-2 Wage and Tax Statements
<input type="radio"/>	<input type="radio"/>	Form 1095s – Health insurance marketplace statement (1095-A), health coverage (1095-B) and Employer-provided health insurance offer and coverage (1095-C)
<input type="radio"/>	<input type="radio"/>	Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)
<input type="radio"/>	<input type="radio"/>	Form 2439s -notice to shareholder of undistributed long-term capital gains
<input type="radio"/>	<input type="radio"/>	Schedule K-1s - partnership, S Corporation and estate or trust income
<input type="radio"/>	<input type="radio"/>	Pensions (including Disability Pension) amounts and forms
<input type="radio"/>	<input type="radio"/>	Alimony Received
<input type="radio"/>	<input type="radio"/>	Closing papers from Sale of Property or Home
<input type="radio"/>	<input type="radio"/>	Gambling winnings or loss (W2-G)
<input type="radio"/>	<input type="radio"/>	Other Income- Gifts, Aid to Dependent Children, Veteran's Pensions and Disability Payments, Railroad Retirement Benefits
<b>You</b>	<b>Spouse</b>	<b>Deductions &amp; Credits</b>
<input type="radio"/>	<input type="radio"/>	IRA (Individual Retirement Accounts) amount of contributions and withdrawals from your plan; value of account at end of the year
<input type="radio"/>	<input type="radio"/>	Child and Dependent Care Expenses-List of expenses and people to whom you made payments.
<input type="radio"/>	<input type="radio"/>	Form 1098 Mortgage Interest Paid
<input type="radio"/>	<input type="radio"/>	Closing papers from Purchase or Refinance of your home (HUD Statement)
<input type="radio"/>	<input type="radio"/>	Charitable contributions (cash and non-cash)
<input type="radio"/>	<input type="radio"/>	Moving expenses
<input type="radio"/>	<input type="radio"/>	Investment transactions
<input type="radio"/>	<input type="radio"/>	Foreign earned income and foreign taxes paid
<input type="radio"/>	<input type="radio"/>	College tuition paid – A 1098-T form is mandatory; Receipts for cost of books & supplies
<input type="radio"/>	<input type="radio"/>	Energy efficiency property improvements
<input type="radio"/>	<input type="radio"/>	Unreimbursed business expenses
<b>You</b>	<b>Spouse</b>	<b>Michigan Property Tax</b>
<input type="radio"/>	<input type="radio"/>	Copy of all Property Tax Bills and payments, including State Taxable Value