TAX ORGANIZER

Please use this as a guide to gather your necessary tax documents in preparation for our initial Client Meeting. This list is by no means all inclusive. There may be additional tax-related documents required for your tax return preparation. If you are unsure about a document, bring it with you to your initial meeting.

Tax Year: 2023

Income:

- [ ] W-2 Forms (wages and salary)
- [ ] 1099-MISC and/or 1099-NEC Forms (self-employment income)
- [ ] 1099-INT Forms (interest income)
- [ ] 1099-DIV Forms (dividend income)
- [ ] 1099-B Forms (stock sales and other investments)
- [ ] K-1 Forms (partnerships, S corporations, or trusts)
- [ ] Social Security benefits statement
- [ ] Rental property income and expense statements
- [ ] Self-employment income and expense statements
- [ ] Unemployment compensation statements
- [ ] Alimony received

Deductions:

- [ ] Form 1098 for mortgage interest and property taxes paid
- [ ] Charitable donation receipts
- [ ] Medical and dental expenses
- [ ] Student loan interest paid
- [ ] Education expenses
- [ ] Retirement account contributions
- [ ] Home office expenses
- [ ] Childcare expenses
- [ ] Adoption expenses
- [ ] State and local taxes paid
- [ ] Real estate and/or sales taxes paid
- [ ] Alimony paid

Health Insurance:

- [ ] Form 1095-A for marketplace insurance or health insurance premiums paid

Other Information:

- ☐ Previous year's tax return (if you are a new client)
- ☐ Bank account and routing number for direct deposit or payment of taxes owed
- ☐ Any correspondence received from the IRS or state tax agency

Thank you for completing this tax organizer. If you have any questions, please contact us at info@vptaxconsulting.com.