PERSONAL SOLUTIONS
TAX SERVICES

4802 Benbrook Hwy, Suite 8 | Fort Worth, TX 76116 | Telephone (682) 224-6884 | Facsimile (866) 897-5386
URL: www.mypersonalsolutions.com | Email: hawkins_elbert@yahoo.com

2022 1040 Organizer Information Checklist

Print the organizer on one side of paper only. This way we can properly scan your documents.

This is a list of the most common items we'll need to finish your returns. We'll call you if we need anything else.

If you are sending an **email with an attachment**, we can accept any size. We will not open zip files for security reasons. If you are sending an email with an attachment, please notify us of that fact by a separate email.

- [ ] **Signed Annual Engagement Letter and Exhibit A (MANDATORY)**
- [ ] **Completed Taxpayer Questionnaire (MANDATORY)**
- [ ] **Signed Consent to Use of Tax Information (MANDATORY to receive our newsletter)**
- [ ] All tax return packets, mailing labels and correspondence sent to you by the various taxing agencies
- [ ] All W-2's
- [ ] All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, cancellation of debt, credit and debit card transactions, etc.
- [ ] All 1094 and 1095 forms related to health care transactions.
- [ ] All income tax information for children if you want us to prepare any required returns
- [ ] Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid
- [ ] Total of charitable contributions, and details for any non-cash contributions over $500. **All contributions must have receipts.**
- [ ] Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)
- [ ] If you bought, sold or refinanced real estate, then the 2 page HUD closing statement for each transaction
- [ ] If you sold any stock or virtual currency, we need the sale price and basis information if not provided by the broker on Form 1099.
- [ ] If you are claiming auto mileage as a deduction for business, rental properties or unreimbursed employee expenses, we need to know: total miles, commuting miles, and business miles driven for the year
- [ ] If you are deducting actual vehicle expenses, please provide date of purchase (or lease) and the vehicle purchase price (or leased fair value) and all vehicle expenses such as lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.
- [ ] Copies of any federal, state or local tax correspondence received during the year

- [ ] The dates and amounts paid for **all estimated tax payments** and the amount of all refunds or rebates received (Notice 1444 for Stimulus Payments)
- [ ] All legal documents for formation, sale or purchase of a business during the year
- [ ] All legal documents for divorce decrees
- [ ] Voided check (not deposit slip) for account where refunds should be direct deposited (optional)
- [ ] All gambling income and loss records
- [ ] **New clients:** copies of prior year federal, state and local returns and depreciation schedules if applicable

Thank you for the opportunity to provide you awesome service.

____
Tax Payer Signature

____
Date