



Be sure to enclose the following items with your Tax Organizer:

- **Social Security Cards** – We need copies of your Social Security card and the Social Security cards of your spouse and dependents (if we have not previously prepared your returns).
- **ALL W-2s** – from all employers
- **ALL 1099s, 1098s, K-1s, anything providing tax information** – for example:
 - Letter 6419 Advanced Child Tax Credit Payments
 - Notice 1444-C Notice of Your Economic Impact Payment received in 2021
 - CP101A Identity Protection PIN
 - HUD-1 Closing statement for sale or purchase of real estate
 - K-1 Share of Income, Deductions, Credits from LLCs, partnerships, S corporations, and Trusts
 - 593-B California Real Estate Withholding Tax Statement
 - 1095-A Health Insurance Marketplace Statement
 - 1095-B Health Coverage
 - 1095-C Employer-Provided Health Insurance Offer and Coverage
 - 1098 Mortgage Interest Statement
 - 1098-T Tuition Statement
 - 1099-A Acquisition or Abandonment of Secured Property
 - 1099-B Proceeds from sale of securities (We will need a complete schedule of dates sold, sale proceeds, dates purchased, and amount paid for all transactions. Most financial institutions provide this to you in a separate mailing).
 - 1099-C Cancellation of Debt
 - 1099-DIV Dividend income
 - 1099-G State unemployment/State tax refund
 - 1099-INT Interest income
 - 1099-K Merchant Card and Third-Party Network Payments
 - 1099-MISC Miscellaneous income (rents, royalties, and other income)
 - 1099-R Pension/Retirement distribution
 - 1099-SSA Social Security received
 - 1099-S Proceeds from sale of real estate (We also will need the final settlement statements and information for the purchase date, purchase price of the property and any improvements on the property sold.
 - 5498 IRA Contribution Information
 - 5498-SA HSA, Archer MSA, or Medicare Advantage MSA Information
- **ALL pages of mutual funds statements** – for sale of securities showing gains/losses and details of US government and state tax exempt income
- **Contracts** – on any vehicles purchased or leased during the year
- **Final closing settlement statements (HUD-1)** – for properties purchased, sold, or refinanced during the year
- **Copies of 3 years of prior year returns** (if we have not previously prepared your returns).
- **Notices and bills from the IRS and/or state received during the year**
- **Property tax statements for all real estate owned**
- **ALL questions or concerns you have about your finances, insurance, mortgages, retirement, and investments**
- **Name, address, telephone number and social security or federal ID number for childcare providers**