MV Berardi & Associates
TAX PLANNING & PREPARATION, SMALL BUSINESS FINANCIAL SERVICES

Tax Organizer for Individuals

The following is a list of information that will be required in order to prepare your personal taxes.

1. Last two (2) years' tax returns

2. Social Security numbers and birthdates for spouse, children and other dependents

3. Income Documents:
   All W-2s
   Any statements for miscellaneous income (Form 1099-MISC)
   All interest statements from banks (Form 1099-INT)
   Dividend statements (Form 1099-DIV)
   Unemployment insurance received (Form 1099-G)
   Last year's state refund (Form 1099-G)
   Any Schedule K-1 received from a partnership, an estate, or S Corporation
   Gambling winnings/losses
   Alimony amounts received
   Social Security statements for retirement benefits or disability received
   Proceeds from investment broker (Form 1099-B)
   Year end investment reports from all brokers/dealers

4. Deductions:
   Mortgage interest statement (Form 1098)
   Real estate taxes paid
   Mortgage points paid on a new home, paid by seller, or on a refinance
   Auto excise tax
   Amount of interest paid on student loans
   Record of contributions to any college savings plan or health savings account
   Educator's expenses
   Alimony paid (including ex-spouse's Social Security number)
   Medical expenses – insurance, physicians, hospitals, prescriptions, co-pays, eye exams/glasses, medical devices
   Mileage driven for medical appointments
   Nursing home expenses
   Cash contributions to qualified nonprofit organizations
   Receipts from non-cash donations
   Mileage driven for charitable purposes
   Amount paid for prior year's tax preparation or tax preparation software
   Cost of safe deposit box, investment fees, IRA account fees

5. Other Tax Documents:
   HUD-1 escrow statement for property you bought or sold
   Summary of moving expenses
   Summary of educational expenses (college tuition)
   Summary of your child care, day care, or adult care expenses
   IRA contributions (traditional, SEP, or rollovers)
   Student loan interest paid (1098-E)

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