

# Tax Organizer

## PERSONAL INFORMATION FOR EACH FAMILY MEMBER:

- Name
- Date of Birth
- Social Security Card / ITIN / ATIN
- Last Year's Tax Return [only if PPS did not prepare your prior year return]
- Valid Driver's License
- Proof of Health Insurance for each person listed on your tax return or form 1095A if insurance is through the Marketplace

## INCOME AND TAX INFORMATION:

- W-2's
- Interest (1099-INT or substitute)
- Dividend (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statement)
- Self-Employment Income and Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Sale of any Business Assets
- Gambling or Lottery Winnings
- State Income Tax Refund
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security or Railroad Retirement
- IRA or 401(k) Distribution
- Unemployment Compensation
- Miscellaneous Income (1099-MISC)

## DEDUCTIONS/ADJUSTMENTS:

- Medical Expenses
- Real Estate or Personal Property Taxes
- Mortgage Interest
- Charitable Contributions
- Gambling Losses
- Traditional or Roth IRA Contributions
- Higher Education Expenses or Contributions
- Educator Expenses
- Student Loan Interest

## TAX CREDITS:

- Child Care Provider/Address and Employer Identification Number (EIN) or Social Security Number (SSN)
- Adoption Expenses
- Retirement Savings Contributions
- Qualifying Home Improvements for the Energy Credit
- Premium ACA Tax Credit [may be eligible if insurance is through Marketplace]

