Better Accounting

INDIVIDUAL TAX ORGANIZER – 2019

STEP 1: TAXPAYER INFORMATION

Name ____ SSN __________________ DOB _________________

Spouse Name _______________________________________ SSN __________________ DOB _________________

Street Address ____________________________________ City _______________________ State ____ Zip __________

Do you have any dependents?

Name ______________________________ DOB ___________ SSN ______________________ Relationship ______________

Name ______________________________ DOB ___________ SSN ______________________ Relationship ______________

Name ______________________________ DOB ___________ SSN ______________________ Relationship ______________

Name ______________________________ DOB ___________ SSN ______________________ Relationship ______________

Do you want Direct Deposit information for a possible refund? If yes, provide the following:

Bank Name ______________________ Routing # ______________________ Account # _______________________

Did you make any Estimated income tax payments? If yes, provide dates and amounts:

STEP 2: FORMS

Please provide anything below that applies to you:

- ☐ 2018 Tax Returns, Federal and State
- ☐ Wages/Salaries/Tips (W-2s)
- ☐ Interest Income (1099-INT)
- ☐ Dividend Income (1099-DIV)
- ☐ Pensions/IRAs (1099-R)
- ☐ Social Security Income (SSA-1099)
- ☐ Taxable Scholarships/Fellowships
- ☐ Cancellation of Debt (1099-C)
- ☐ State Tax Refund / Unemployment (1099-
- ☐ G)
- ☐ Stock & Mutual Fund Sales (1099-B)
- ☐ K-1 Forms you received from pass-through
  IRA Contributions (5498)
- ☐ Health Insurance Premiums (if self-employed)
- ☐ Student Loan Interest (1098-E)
- ☐ Property Tax (if not provided on Form 1098)
- ☐ Mortgage Interest Statement (1098)
- ☐ HUD Statements/Closings
  (buy, sell, refi of property)
- ☐ Charitable Contributions /Noncash Donations
- ☐ HSA Contributions (5498 – SA)
- ☐ HSA Distributions (1099 – SA)
- ☐ Health Insurance Forms (1095-A, B, or C)
- ☐ Tuition Paid (1098-T)

STEP 3: MISCELLANEOUS INFORMATION

1. Do you have a rental property? If yes, ask us for a Rental Property Tax Organizer.

2. Did you receive a 1099-MISC? If yes, provide copies of all 1099 Forms. Also provide a complete list of business income and expenses (Profit and Loss Statement) and Balance Sheet, OR ask us for a Sole Owner Business Organizer.

STEP 4: MISCELLANEOUS

Please provide any other important information we should know:

tax@betteraccounting.com