

Tax organizer

The changes from this year and the forms a return is prepared from, in the order a preparer works through them.

This year

Filing status

- ☐ Single
- ☐ Married filing jointly
- ☐ Married filing separately
- ☐ Head of household
- ☐ Qualifying surviving spouse

Did any of this happen this year?

- ☐ Married, divorced or widowed
- ☐ A new child or dependent
- ☐ Bought or sold a home
- ☐ Started, changed or lost a job
- ☐ Started a business or side income
- ☐ Sold stocks, crypto or other investments
- ☐ Moved to another state
- ☐ None of these

Tell us more about anything you ticked

Income

☐ Your W-2s

One from each employer you worked for this year.

☐ Your 1099s

Interest, dividends, brokerage, retirement distributions and freelance work.

☐ Any K-1s from a partnership, S corporation or trust

Deductions and payments

- ☐ **Your mortgage interest statement (Form 1098)**
- ☐ **Receipts for charitable gifts**
- ☐ **Records of estimated tax payments you made**
- ☐ **Anything else you think we should see**