TAX AND ACCOUNTING · FREE TEMPLATE

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**