TAX ORGANIZER

Please use this as a guide to gather your necessary tax documents in preparation for our initial Client Meeting. This list is by no means all inclusive. There may be additional tax-related documents required for your tax return preparation. If you are unsure about a document, bring it with you to your initial meeting.

Tax Year: 2024

Income:

- ☐ W-2 Forms (wages and salary)
- ☐ 1099-MISC and/or 1099-NEC Forms (self-employment income)
- ☐ 1099-INT Forms (interest income)
- ☐ 1099-DIV Forms (dividend income)
- ☐ 1099-B Forms (stock sales and other investments)
- ☐ K-1 Forms (partnerships, S corporations, or trusts)
- ☐ Social Security benefits statement
- ☐ Rental property income and expense statements
- ☐ Self-employment income and expense statements
- ☐ Unemployment compensation statements
- ☐ Alimony received

Deductions:

- ☐ Form 1098 for mortgage interest and property taxes paid
- ☐ Charitable donation receipts
- ☐ Medical and dental expenses
- ☐ Student loan interest paid
- ☐ Education expenses
- ☐ Retirement account contributions
- ☐ Home office expenses
- ☐ Childcare expenses
- ☐ Adoption expenses
- ☐ State and local taxes paid
- ☐ Real estate and/or sales taxes paid
- ☐ Alimony paid

Health Insurance:

- ☐ Form 1095-A for marketplace insurance or health insurance premiums paid

Other Information:

- ☐ Previous year’s tax return (if you are a new client)
- ☐ Bank account and routing number for direct deposit or payment of taxes owed
- ☐ Any correspondence received from the IRS or state tax agency

Thank you for completing this tax organizer. If you have any questions, please contact us at info@vptaxconsulting.com.