

**Income Tax Organizer--Basic (12/10/15)**

<b>Form</b>	<b>Description</b>	<b>Number of Forms</b>
W2	Wages	
1099 INT	Interest Income	
1099 DIV	Dividend Income	
1099 B	Stock Sales	
1099 MISC	Misc. Nonemployee Income	
1099 SSA	Social Security Income	
1099 G	Government Income	
1099 R	IRA/Retirement Distributions	
1098	Mortgage Interest Statement	
1098 T	Tuition Statement	
K-1	Partner or Shareholder Allocations	
-	Any other 1099 forms	

For the following, please mark any that apply and attach relevant information (worksheets, documents, etc.). Referring to last year's tax return should help you avoid omissions.

Estimated tax payments (federal and state) : include credit year, payee, dates, and amounts
IRA contributions, and whether they were traditional or Roth (must pay by April 15)
Interest income from US or WV bonds or obligations
Real estate: purchases, sales, or refinances
Itemized deductions: medical (if over 10 percent of adjusted gross income), mortgage interest, mortgage insurance, investment interest, real estate or personal property taxes, charitable contributions, casualty or theft losses, and unreimbursed job- or income-related expenses
Foreign bank accounts or foreign trusts
Retirement pay from the following services: police officer, military, WV teacher, federal govt.
New or former dependents: list, and if new, provide name, relationship, DOB and SSN
Dependents who file their own tax return: mark if they claim their own exemption
Health insurance: All year, did you have health insurance that meets Minimum Essential Coverage (your insurance provider could tell you)? Attach any 1095 forms you may have received.
Business income: provide income statement and schedule of any assets bought or sold
Vehicles used for business: for EACH vehicle, provide year, make, and model; total miles driven for the year; total business miles driven for the year. We assume you have an extra personal vehicle.
New address or marital status: provide details
New account for direct deposit: provide void check
New email address, if we may contact you with it (we will not send solicitations)
Estimated tax payments for next year: identify any significant financial changes anticipated
Notices concerning prior federal or state income tax filings (for example, adjusted refund)
Any other sources of income (rental, business, royalties, etc.): provide list or schedules
For WV: payments toward Prepaid Tuition or Savings Plans, EZ Pass, long term care insurance, or neighborhood investment program; Homestead exemption form SCTC1
Any other information that you believe may involve your income taxes

We will rely on last year's return for the following, unless notified: address, dependent exemptions, marital status, direct deposit election and account number, presidential campaign fund designation. For deductions that you provide us, we will assume you maintain supporting documentation. Also, if we need additional information to complete your return as of March 31, we will file an extension.