Individual Tax Organizer

Use this organizer to gather the information commonly needed to prepare an individual income tax return.

Sage the Sloth
Slow Down. Plan Smart. Save More.

Client information

Taxpayer full legal name	
Spouse full legal name (if applicable)	
Current mailing address	
Phone number	
Email address	
Preferred refund/payment bank information - provide securely	

Personal and family changes

- [ ] Marriage, divorce, separation, or change in filing status
- [ ] New child, dependent, or change in custody arrangement
- [ ] Dependent started or stopped attending college
- [ ] Moved to a new state or worked in more than one state
- [ ] Bought, sold, or refinanced a home
- [ ] Started or closed a business or side activity
- [ ] Received cryptocurrency, digital-asset, or foreign-account activity
- [ ] Received an IRS, state, or local tax notice

Income documents

- [ ] Forms W-2 from all employers
- [ ] Forms 1099-NEC, 1099-MISC, 1099-K, or other self-employment income
- [ ] Forms 1099-INT and 1099-DIV
- [ ] Forms 1099-B and year-end brokerage statements
- [ ] Forms 1099-R and pension or retirement statements
- [ ] Social Security Form SSA-1099
- [ ] Forms K-1 from partnerships, S corporations, trusts, or estates
- [ ] Rental property income and expense records
- [ ] Unemployment, gambling, prize, alimony, or other taxable income documents

Deductions, credits, and payments

- [ ] Mortgage interest and real estate tax statements
- [ ] Charitable contribution receipts and noncash donation records
- [ ] Childcare provider name, address, tax ID, and amount paid
- [ ] Form 1098-T and education expense statements
- [ ] Form 1098-E for student loan interest
- [ ] Form 1095-A for Marketplace health insurance
- [ ] HSA Forms 1099-SA and 5498-SA
- [ ] Retirement or IRA contribution records
- [ ] Federal, state, and local estimated tax payments with dates and amounts
- [ ] Energy-efficiency or clean-vehicle purchase documentation, if applicable

Notes for your preparer

Important: This resource is a general preparation tool and is not legal or tax advice. Additional information may be required based on your facts, filing status, entity type, states, localities, or tax notices.