Individual Tax Organizer (Form 1040)

Work through each section, attach the documents listed, and return everything to your tax preparer.

CLIENT NAME	TAX YEAR	PHONE / EMAIL

Answer what you can and gather documents as you find them. If something doesn't apply, skip the follow-ups under it. Items marked ATTACH are documents to include with this organizer.

1 · About you

A few basics so your preparer files with the right details.

☐ **What is your filing status?**

☐ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household

☐ **Did your marital status change this year?**

☐ Yes ☐ No

IF YES Date of the change:

☐ **Did you move this year?**

☐ Yes ☐ No

IF YES New address (street, city, state, ZIP) and move-in date:

☐ **At any time this year, did you receive, sell, or otherwise dispose of digital assets (crypto or NFTs)?** Every return must answer this. Just buying or holding with cash does not count as Yes.

☐ Yes ☐ No

IF YES Describe the activity and list the exchanges or wallets used:

ATTACH Year-end statements or transaction exports from each exchange or wallet, including any Form 1099-DA.

2 · Dependents

Anyone you will claim on this return.

☐ **How many dependents will you claim?**

☐ None ☐ 1 ☐ 2 ☐ 3 or more

FOR EACH Full name and date of birth (continue on the back if needed):

3 · Income

Attach each income document as you receive it.

☐ ATTACH **W-2s from each employer** One W-2 per employer, including any job you left during the year.

☐ **Any investment income (interest, dividends, or brokerage accounts)?**

☐ Yes ☐ No

IF YES ATTACH Every 1099-INT, 1099-DIV, and 1099-B, plus brokerage year-end statements.

☐ **Any K-1s from partnerships, S corps, or trusts?**

☐ Yes ☐ No

IF YES ATTACH Each K-1. They often arrive late — send what you have and forward the rest when they arrive.

☐ **Did you receive retirement, pension, or Social Security income?**

☐ Yes ☐ No

IF YES ATTACH A 1099-R for each pension, annuity, or IRA withdrawal, plus your SSA-1099 for Social Security.

☐ **Did you sell a home or other property this year?** Investments sold through a brokerage are already covered above.

☐ Yes ☐ No

IF YES What you sold, when you bought and sold it, and the sale amount:

4 · Business & rental income

Only needed if you worked for yourself or owned a rental.

☐ **Did you have any self-employment income (freelance, gig work, or your own business)?**

☐ Yes ☐ No

IF YES ATTACH 1099-NEC and 1099-K forms, plus a summary of income paid to you directly.

Business expense totals by category (supplies, software, travel, vehicle mileage):

Did you use part of your home regularly and exclusively for this business?

☐ Yes ☐ No

IF YES Square footage of the space, total square footage of your home, and rent or home costs for the year:

☐ **Did you own rental property this year?**

☐ Yes ☐ No

IF YES For each property: address, days rented, total rent received, and expense totals by category.

ATTACH Statements, spreadsheets, and Form 1098 for any rental mortgage.

5 · Deductions & payments

Deductions, credits, and tax payments already made.

☐ **Do you plan to itemize deductions?** Not sure? Answer Yes and attach what you have — your preparer will work out whether itemizing beats the standard deduction.

☐ Yes ☐ No

IF YES ATTACH Mortgage interest statements (Form 1098), charitable donation receipts, and medical expense records if out-of-pocket costs were significant.

☐ **Did you pay for childcare or dependent care so you could work?**

☐ Yes ☐ No

IF YES ATTACH A year-end statement from each provider showing their name, address, tax ID number, and the total you paid.

☐ **Did you or a dependent pay college tuition or student loan interest?**

☐ Yes ☐ No

IF YES ATTACH Form 1098-T (from the school) and Form 1098-E (from your loan servicer).

- [ ] **Did you put money into an HSA or IRA, or spend from an HSA?** Don't count payroll HSA contributions — those are already on your W-2.
  - [ ] Yes - [ ] No

  IF YES Account type (HSA, traditional IRA, Roth IRA) and the amount in or out:

  ATTACH Forms 1099-SA, 5498-SA, and 5498 if you have them.

- [ ] **Did anyone on your return have Marketplace (healthcare.gov) health insurance this year?**
  - [ ] Yes - [ ] No

  IF YES ATTACH Form 1095-A — your preparer cannot e-file without it. Find it in your healthcare.gov account under Tax forms.

- [ ] **Total estimated tax payments made** Federal and state estimated payments for this tax year. Enter 0 if none.

- [ ] ATTACH **Prior year tax return** Skip this if the same firm prepared your return last year.

6 · Wrap up

- [ ] **Did you get any letters from the IRS or your state tax agency, or an Identity Protection PIN?**
  - [ ] Yes - [ ] No

  IF YES ATTACH Each letter or notice, including your IP PIN letter (CP01A) — e-filing needs the current PIN.

- [ ] **Anything else your preparer should know about this year?** Life changes, new income sources, big purchases, or anything you're unsure about.