

Streamlined Tax Organizer / Checklist

Please bring all W-2 forms, 1099s, 1098s, and all other tax forms.

One-time requirement: Provide a birth certificate or SSN card for each dependent.

Did all dependents live with you for more than 6 months of the year? Y N

Did you provide more than 50% of your child(ren)'s support? Y N

Provide a copy of your driver's license.

Did you have health insurance all year, for each person? Y N

Did you have Obamacare? Y N If yes, please provide the 1095-A

Did you buy a new car? Sales tax paid _____

Provide all 1098-T forms for all college students.

If you own your home: What county: _____ PIN _____

Please provide 1098 for mortgage interest and property tax paid.

Medical expenses out of pocket over 10% of income? Total amount: _____

Total charitable giving via check or credit card: _____

Total non-cash charitable donations e.g. Goodwill, AmVets, etc.: _____

If the total of non-cash donations is over \$500, please list:

Date of each donation, to which charity given and the value of each donation

If you had *self-employment income*, please provide:

All 1099 forms

Total income via check, cash or credit card

All expenses, broken down by category

If you *rented a property to others*, please provide:

Total income

All expenses, broken down by category

Does your child(ren) go to private school? Provide the statement of tuition paid.

Public school: Provide school name and registration fees paid for each child.

Bank routing and account number for direct deposit or direct debit:

Routing # _____ Bank Account # _____

Dates and amounts of quarterly estimated payments paid to the IRS and to IL.

If you have a balance due, do you prefer to pay by direct debit or mail a check? _____