K.R. Colby & Associates, Inc.
INCOME TAX & ACCOUNTING SERVICES

DATE: ________ 2019

Please complete this organizer and bring it with you to your appointment or when you drop off your tax documents.
Note: Only certain returns can be handled as "drop-off". Most require an appointment. Please call the office for clarification.

Taxpayer Name: ______________________________ Spouse Name: ______________________________

Phone: ______________________________ Phone: ______________________________

Email (optional): ______________________________ Email (optional): ______________________________

Occupation: ______________________________ Occupation: ______________________________

- Address: **Same as last year** *or* **New**
- Direct Deposit: **Same account as last year** *or* **No DD** *or* **New account**
  (*New: list name of bank/cu, routing number, account number, and type of account; sav/check)*
- Filing Status: **Same as last year** *or* **New** S-MFJ-MFS-HOH-QW
  (include name/SS number of spouse if MFS or QW)
- Dependents: **Same as last year** *or* **Add** (*name/SSnumber/birthdate/gender)* **Remove** (name)
- Health Insurance:
  - Coverage every month of year for everyone on return? **Yes** *or* **No** (*note exceptions)*
  - Purchased through the Marketplace? **Yes** *or* **No** (*if yes, you **must** include Form 1095-A)*
  - Purchased through employer? **Yes** *or* **No** *(may get 1095-B and/or 1095-C - not required)*
  - Medicare, Medicaid, CHIP? **Yes** *or* **No** *(may get 1095-B - not required)*

PLEASE ☑ OR CIRCLE ALL OF THE INFORMATION THAT APPLIES TO YOU

- ☐ All copies of W-2 forms and K-1 forms.
- ☐ 1099 forms reporting retirement income, unemployment compensation, social security benefits, miscellaneous income, and interest income.
- ☐ Any forms reporting retirement account withdrawals, transfers or contributions.
- ☐ Itemized deductions; mortgage interest (included all 1098 forms), real estate taxes, charitable contributions (cash and non-cash itemized and valued), qualified medical expenses, personal property tax (motor home/second home), sales tax on major purchases (vehicles, RVs, boats).
- ☐ 1099 forms for Health Savings account withdrawals. Form 5498 for contributions.
- ☐ Alimony received or paid. Include amount and associated social security number.
- ☐ Schedule summarizing business, farm and/or rental income and expenses.
- ☐ 1099 forms reporting sale of mutual funds, bonds and stocks. Purchase date and cost basis info.
- ☐ Name, address, and social security or tax ID number of child care providers. List the amount paid for each dependent. Adoption expenses.
- ☐ 1098-T forms for higher education expenses for you and your dependents. Also list *actual amount paid* for tuition (may not coincide with 1098-T), books and school supplies. 1098 form for interest paid on student loans. Teacher/educator expense deduction (up to $250).
- ☐ If you purchased, sold or refinanced a home, please bring a copy of the settlement statement (HUD) or closing disclosure, a 1099-S (if issued) and the original purchase date and price.
- ☐ Solar panel purchases; bring copy of the receipt and complete the application for Utah Form TC-40E. Receipts and manufacturer certifications for other qualified energy credit purchases.
- ☐ Date and amount of each federal and state estimated tax payment made throughout the year.
- ☐ Any IRS or state tax correspondence received during the year.
- ☐ Additional information necessary to complete your tax return. Include summary or spreadsheet.

Note: This is a general guide only. Each tax situation is unique and other information may be needed.

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