Client Tax Records Organizer

CLIFFORD & ASSOCIATES, LLC

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Name(s)(Type or print) **Tax Year:**

Please use this organizer for this year's filing season. Please read carefully. Complete, sign, and date only the worksheets that apply. If you need more space, please copy pages or attach a separate sheet. Return by email, scan to email, regular mail, fax or in person at your appointment. Uploading forms through Intuit's Proconnect Link® is the most secure way to contact us. Email us for instructions.

The information requested by this form will help us evaluate your tax situation and concentrate our efforts in preparing a complete return**. Do not copy information printed plainly on W-2's, 1099's, and other tax reporting statements. Send us copies of the forms instead.**

Please complete the following document checklist. **Copies of documents are fine. Avoid sending originals.**

	First time clients only: Copies of 2 forms of ID, including one photo ID. The IRS requires us to ask for this to help prevent fraud. We also need 2 ID's for each child for EIC.
	Copy of previous year's tax return (if not prepared by Clifford & Associates)
	Forms(s) W-2 received from all employers
	Form(s) 1099, 1098 & 1095-A for reporting income from interest, dividends, independent contractors, pensions, IRA's, 403B plans, tax refunds, HSA or MSA medical accounts, cancellation of debt, foreclosure, unemployment benefits, gambling winnings or annuities
	Form(s) SSA-1099 or RRB-1099 for Social Security, SSI, or Railroad Retirement benefits
	Form 1099-B Tax reporting forms from brokerage firms, custodian, or mutual fund company, or other documents for reporting sales of stocks, mutual funds or other assets.
	Form(s) 1098 for reporting mortgage interest, points, college tuition, student loan interest
	Schedule(s) K-1 for reporting partnership, estate, and trust income and deductions
	Statement(s) of gambling winnings, prizes, awards, jury-duty pay, or hobby income
	HUD-1 or other closing statement, if you bought, sold, or refinanced your home
	College account statement(s) showing the dates and amounts actually paid during the year
	Statement(s) showing the amount(s) of Veteran's Benefits or Worker's Compensation Benefits that you received during the year. NOTE: These are usually not taxable. However, they do count towards the calculations of certain tax deductions.
	Any letters from the IRS, State or Cities
	Optional: 401k Statements & login information for an annual review of allocations.