Mira Mesa
Tax Services Inc

TAX FORMS ORGANIZER

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Please complete this tax organizer and return with your tax documents to your tax preparer.

Information needed to prepare your tax return

Personal Information:

- New clients: Social Security Card
- A valid Driver License or Passport or State Identification Card.
- All W2's including W2-G's (Gambling).
- All 1099's (NEC, MISC, DIV, R, INT, SSA, G, B) – we need the forms, not a prepared list.
- 1095-A, 1095-B, 1095-C – Medical insurance declaration.
- Bank information for refund routing and bank number.
- New clients: copy of last year's tax return (federal and state).
- Dependent information (name, ssn#, date of birth).
- All income information (unemployment, alimony (paid/received), social security, state refund, miscellaneous income).
- Home mortgage interest & real estate taxes (1098 - if you do NOT have an escrow account, we need a copy of your real estate tax bills paid).
- Charitable contributions (donee, amount and description).
- Medical expenses and mileage (if you believe the total medical expenses will exceed 7.5% of adjusted gross income).
- Copy of last year's auto vehicle license fees.
- Student Loan interest; 1098-T Tuition payments (and year in school of student).
- IRA/Roth IRA contributions statement, Form 5498.
- HSA contributions and distributions.
- If you sold stock, bonds or mutual funds during the year, provide all forms 1099-B of your broker.
- All forms related to ESPP stock purchases and sales.
- For sale or purchase of real estate provide: a description of the property, date of purchase, date of sale, purchase price, selling price, expenses of sale, improvements or other cost/basis additions, and closing statements (final HUD settlement statements).
- If you refinanced your home, include a copy of the closing statement (final HUD settlement statement).
- Any debt forgiven? Include 1099-C and details of the transaction.
- Childcare expenses (provider name & address, SSN# or EIN#, amount paid per child).
- Estimated taxes (need amounts and dates of payment).
- Schedule K-1 for partnerships, joint ventures, S-corporations, estates or trusts.
- Any other items relevant to your situation.

Mira Mesa Tax Services Inc – 8400 Miramar Road, Suite #227A, San Diego, CA 92126 – Phone: 858-348-4746
www.MiraMesaTaxServices.com – Email : Mathieu@MiraMesaTaxServices.com

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Important Dates to Remember

January 15, 20XX - 4th quarter estimated tax payment due
January 31, 20XX - W2's/1099's to employees must be mailed
March 15, 20XX – S-Corporation, Partnership and LLC tax returns are due
April 15, 20XX - Personal returns are due / 1st quarter estimated tax payment due

Privacy Policy

We value you as our client, and your privacy is important to us. Please read our privacy policy below. If you have any questions about our privacy policy, please contact us.

We collect nonpublic information about you from the following sources:

1. Information we receive from interviews regarding your tax situation;
2. Information we receive from you on applications, organizers, worksheets and other forms or by other means, such as your name, address, telephone number, social security number, dependents, income, and other tax-related data;
3. Information from tax-related documents you provide that are required to process tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions, etc.
4. Information about your transactions with us, our affiliates or others.

We do **NOT** disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or required by law. We restrict access to nonpublic personal information concerning you. We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

Sign Here

The enclosed information is furnished for use in my income or estimated tax and for that purpose only, and shall be treated as confidential. This information is correct to the best of my knowledge and belief.

(Both spouses must sign for preparation of joint returns.)

Your name / signature Date

____ ____________

Spouse's name / signature Date

____ ____________

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