

## 1040 DOCUMENT LIST

To help keep your tax organization time to a minimum, use an envelope to collect:

- \_\_\_ Original Form W-2's
- \_\_\_ 1099-Int
- \_\_\_ 1099-Div
- \_\_\_ 1099-Misc
- \_\_\_ K-1's (from businesses, investments, estates or trusts)
- \_\_\_ Brokerage statements showing stock transactions, IRA investments
- \_\_\_ Closing Statements regarding the sale and purchase of real estate
- \_\_\_ 1099-R (for retirement distributions)
- \_\_\_ 1099-G (Unemployment Compensation)
- \_\_\_ SSA-1099 (Social Security Distributions)
- \_\_\_ W-2G (Gambling Winnings)
- \_\_\_ Real estate tax bill and receipt of payment
- \_\_\_ 1098 Mortgage Interest Statements
- \_\_\_ Medical Expenses, Contribution Receipts
- \_\_\_ IRS or State Department of Revenue Notices received during the year
- \_\_\_ *All envelopes* stamped with the phrase "Important Tax Information"

### Other Helpful Information

Did you have a baby, adopt, get married or divorced this year?

Did your address change?

Did you purchase, sell or refinance any real estate?

Did you make any Estimated Tax Payments to Federal/State?

Open an IRA?

*Please contact my office to receive a personalized organizer, showing last year's data or to ask any questions regarding planning.*

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**§ Susan J. Sehmer CPA, LLC**

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