1040 DOCUMENT LIST

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

INCOME ITEMS

___ Original Form W-2's

___ 1099-INT (Interest)

___ 1099-DIV (Dividends)

___ 1099-MISC (Miscellaneous Income)

___ K-1's (from businesses, investments, estates or trusts)

___ Brokerage statements showing stock transactions, IRA investments

___ 1099-R (Retirement Distributions)

___ 1099-G (Unemployment Compensation)

___ SSA-1099 (Social Security Distributions)

___ W-2G (Gambling Winnings)

CREDIT/DEDUCTION ITEMS

___ Did you, or will you, open or contribute to an IRA or HSA?

___ Are you a licensed teacher? (Your cost of materials can be deducted)

___ Did you or a dependent attend College? (Provide form 1098-T (Tuition))

___ Real estate tax bill Plus receipt of payment

___ 1098 Mortgage Interest Statements

___ Medical Expenses (Please list health insurance premiums separately)

___ Contribution Totals (Cash and Non-cash) We do not want to see receipts

OTHER – Please provide detail of the following, if applicable:

___ Estimated Tax Payments to Federal/State

___ Closing Statements regarding the sale and purchase of real estate

___ IRS or State Department of Revenue Notices received during the year

___ *All envelopes* stamped with the phrase "Important Tax Information"

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

___ Did your address change?

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

§ Sehmer & Son CPA, LLC

(262) 377-7595

1507 Wisconsin Avenue; PO Box 1166;Grafton WI 53024