

# Tax Organizer

To make your tax appointment as easy and painless as possible, complete each applicable section below and bring the selected items to your next appointment with us.

## Tax documents

See what documents apply to you; bring those with you to your appointment.

### Applicable tax documents

- All 1099s (for interest, dividends, from brokerage accounts, social security, retirement accounts, unemployment, state tax refund, miscellaneous income)
- W-2G (gambling income)
- K-1s (partnerships, S-corporations, estates, trusts)
- Documents showing student loan interest paid
- Documents showing HSA contributions and distributions
- 1099Q (withdrawals from an education account)
- 1098T (tuition paid)
- 1099A or 1099C (abandonment or foreclosure of property, cancellation of debt)
- Closing statements on any property purchased or sold
- Documents on any other income you received
- Legal papers for adoptions, divorce or separation
- Tax notices received from IRS or state taxing authorities
- Receipts for Arizona Tax Credit donations (if you are not sure, bring them in)
- Copy of last year's tax return if not prepared by us

## Tax payments

Complete this section if you make estimated tax payments. Please provide the dates and amounts of payments sent in.

Record any **Federal tax payments** made

Date	<input type="text"/>	\$	<input type="text"/>
Date	<input type="text"/>	\$	<input type="text"/>
Date	<input type="text"/>	\$	<input type="text"/>
Date	<input type="text"/>	\$	<input type="text"/>

Record any **State tax payments** made

Date	<input type="text"/>	\$	<input type="text"/>
Date	<input type="text"/>	\$	<input type="text"/>
Date	<input type="text"/>	\$	<input type="text"/>
Date	<input type="text"/>	\$	<input type="text"/>

# Status update

An easy checklist that helps us understand what we need to discuss with you.

Check if any of the following apply to you

- My marital status has changed
- My dependents have changed
- My spouse and I both work or are students and we paid for dependent care\*
- I moved more than 50 miles for a new job\*
- I added insulation, energy efficient exterior windows, energy-efficient heating or energy-efficient air conditioning to my primary residence\*
- I contributed money to a retirement plan
- I have foreign investments or bank accounts
- I have previously been denied Earned Income Credit
- I paid for education for myself, spouse or dependent
- I loaned money to someone with a legal promissory note and it is now uncollectible

*\*Please bring receipts if you checked these items*

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