



MEYER ACCOUNTING & TAX LLC

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CLIENT TAX ORGANIZER

DO YOU HAVE ANY OF THE FOLLOWING?

INCOME SOURCES

- ☐ W2's / 1099-INT / 1099-DIV
- ☐ State Tax Refund Received for last year
- ☐ Sales of Stocks/Bonds / Personal Property / Residence
- ☐ Social Security and/or Retirement Benefits
- ☐ Partnership and/or Trust Income
- ☐ Gambling/Lottery Winnings
- ☐ Alimony Received
- ☐ Rents and Royalties
- ☐ Sales of Personal and/or Other Properties
- ☐ Unemployment Compensation / Other Compensation
- ☐ 1099K - Cash transaction apps (i.e. venmo, zelle, etc.)
- ☐ 1099NEC - Independent Contractor / Self-Employed

ADJUSTMENTS TO INCOME

- ☐ Self-Employed Pension Plans / Health Insurance Premiums
- ☐ IRA Contributions
- ☐ Educator Expenses
- ☐ Student Loan Interest
- ☐ Moving Expenses
- ☐ Alimony - Recipient's full name & Social Security No.

MEDICAL

- ☐ Health Insurance Premiums (not paid through employer)
- ☐ Long Term Care Insurance Premium
- ☐ Transportation / Mileage
- ☐ Prescriptions out-of-pocket
- ☐ Weight Loss & Stop Smoking Programs
- ☐ Home improvements for medical reasons
- ☐ Mental Health
- ☐ Doctor, Dental, Optical, Chiropractors Office Fees
- ☐ Hearing aids, Batteries, Eyeglasses
- ☐ Co-Pays for Insurance

TAXES

- ☐ State & Local Income Tax Payments
- ☐ Last Year's state return and/or extension payments amounts
- ☐ Estimated Taxes Paid to Federal & State (Dates & Amounts)
- ☐ Real Estate and Personal Property Taxes Paid

INTEREST YOU PAID

- ☐ Mortgage interest (Purchases and/or Re-Financed) Form 1098
- ☐ 2nd Home Mortgage and/or Equity Loan Interest
- ☐ Points Form 1098 or unreported interest paid
- ☐ Investment Interest
- ☐ Settlement and/or Closing Statements on homes purchased or sold

25/26 BIG BEAUTIFUL BILL ITEMS

- ☐ Received Overtime Pay
- ☐ Received Tips
- ☐ Financed a new car that was made in the USA

CHARITABLE CONTRIBUTIONS

(Made to Qualified Non-Profit Organizations)

- ☐ Cash and/or Check Contributions with receipts
- ☐ Volunteer Uniform Expenses
- ☐ Volunteer Mileage
- ☐ Non-Cash Donations with receipts and lists

MISCELLANEOUS DEDUCTIONS

- ☐ Gambling Losses
- ☐ Tax Return Preparation Fees
- ☐ Job-Seeking Expenses
- ☐ Casualty and Theft Losses / and any Reimbursements

CHILD CARE EXPENSES

- ☐ Child & Dependent Care Expenses:
- ☐ Include Full Name, Address, Social Security Number, and/or ID Number (EIN) of Provider(s)
- ☐ Amount Paid for Each Dependent (under 13 or Disabled)

QUALIFIED EDUCATION EXPENSES

- ☐ 1098-T from Educational Institution
- ☐ Scholarships Received
- ☐ Books / Room & Board if using 529 plan
- ☐ Contribution to Missouri MOST Program (or other 529 plan)

SMALL BUSINESS

- ☐ Gross Receipts & Sales
- ☐ Returns & Allowances
- ☐ Costs of Goods Sold
- ☐ Direct Expenses (Ex: Advertising, Insurance, Repairs, Supplies, Utilities, wages):
- ☐ Itemized and listed by category
- ☐ Business & Farm Expenses: Listed by category
- ☐ Any Household Employee Information (if paid over \$1400)
- ☐ Business In Home Expenses
- ☐ Mileage or Actual Expenses for Vehicles
- ☐ Depreciation Items / Assets

ENVIRONMENTAL IMPROVEMENTS

- ☐ Energy Efficient Home Improvements: Windows, Doors, Solar, Geothermal

NOTE: This checklist is provided as a *guide* and may not complete for every taxpayer.