



# 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
- 2<sup>nd</sup> 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.