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Information Needed for Individual Income Tax Preparation

Each year we send out a "Tax Organizer" package to the clients who had us prepare their previous year tax returns. The package has the detailed information that was used to prepare the client's prior year return and provides space for them to indicate any changes and to organize the information needed for us to prepare the current year tax returns. The cover letter of our annual tax organizers, which follows, provides an overview of the information most often needed for us to prepare individual income tax returns.

This tax organizer is provided to assist you in compiling the information we need to prepare your "current year" income tax returns. This information is vital for us to properly report each item relating to your income, deductions, taxes, and credits. **Please provide the information for each item shown in the sections labeled "current year" amounts" and indicate if any of the prior tax year activity no longer applies.** The prior year activity is presented in separate columns as a reminder. Be sure to include copies of the related tax documents and insert additional pages if you need more space or have activity which is not shown in this organizer. Please call us if you have questions or need assistance.

It will decrease the time to prepare your returns (and our fee) if you answer the questions shown in this organizer and give us all related information. Be sure to indicate if any activity from the prior tax year no longer applies for the current tax year, otherwise we may spend additional time calling you about it. All of your original documents will be returned to you upon completion of your tax returns. **We must have this Organizer back** as we use it to prepare your returns and keep it in our files as a reference. Please indicate if you want a copy of the organizer for your records.

Please be sure to return this organizer to us and copies of the following documents, if applicable.

- Sign and return the engagement letter that is included with this tax organizer.
- All form(s) W-2 for each job held during the tax year, plus year-end pay stub(s) if they show deductible items.
- All form(s) 1099 showing interest, dividends, rents, or other income for all bank and brokerage accounts.
- A list of realized gains & losses for sales of any investments, showing proceeds and cost basis for each item.
- Schedule(s) K-1 from Estates, Trusts, S Corporations, Partnerships, etc.
- Copy of car registration(s), showing ownership taxes paid
- Mortgage statement(s) showing interest and property taxes paid.
- Closing statement(s) for the purchases or sales of real estate, or for refinancing of any mortgage(s).
- Statement(s) for tuition and education expenses with amounts of qualifying expenses and dates actually paid.
- Statement(s) for contributions to and distributions from Health Savings Accounts (HSA), but not FSA's.
- Detailed list of each non-cash donation, with the date, charity's name, the description & value of each item.
- Any other documents relating to activity which may affect the current year's tax returns.

Using this tax organizer, and its instructions, helps to insure that we get all the information necessary for us to prepare complete and accurate tax returns. **Please return this Organizer to us**, along with the related information even if it is not completely filled out. Your cooperation is greatly appreciated.

Please sign and return the enclosed engagement letter and note the tax appointment (if any) referenced on the enclosed cover letter. Please call us if you have any questions, need assistance, or wish to reschedule or cancel your appointment. Please visit our website at www.Online-CPA.com for additional information.

For new clients we use the prior year tax returns as a guide and discuss if there are any changes in the current year activity. We encourage clients to call if they have questions about what information is needed to prepare their income tax returns. Otherwise, it is always better to have too much information than to find out later that something was missing.