If you are a returning client, you may ask Schulte & Company to send you a tax organizer in January that includes details of your prior year return. You can then use the organizer as a guideline for what will be needed to complete your current year return.

If you are a new client, the following is a checklist of items that may be needed for your current year tax return:

- ☐ Your date of birth and social security number
- ☐ Your address
- ☐ Your spouse's full name and social security number
- ☐ Amount of any alimony paid and ex-spouse's social security number
- ☐ If you are a new client, your prior year's tax return

Other people who may belong on your return

- ☐ Dates of birth and social security numbers
- ☐ Childcare records (including the provider's ID number) if applicable
- ☐ Approximate income of other adults in your home (not spouse, if you're filing jointly)
- ☐ Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you

Education Payments

- ☐ Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
- ☐ Forms 1098-T and 1098-E, if you received them
- ☐ Scholarships and fellowships

Employee Information

- ☐ Forms W-2

Self-Employment Information

- ☐ Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s.
- ☐ Records of all expenses — check registers or credit card statements, and receipts

- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Office in home information, if applicable

Vehicle Information

- ☐ Total miles driven for the year (or beginning/ending odometer readings)
- ☐ Total business miles driven for the year (other than commuting)
- ☐ Amount of parking and tolls paid
- ☐ If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Income

- ☐ Records of income and expenses
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income

- ☐ Pension/IRA/annuity income (1099-R)
- ☐ Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Dates of acquisition and records of your cost or other basis in property you sold

Other Income

- ☐ Unemployment, state tax refund (1099-G)
- ☐ Gambling income (W-2G or records showing income, as well as expense records)
- ☐ Amount of any alimony received and ex-spouse's name
- ☐ Health care reimbursements (1099-SA or 1099-LTC)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Other 1099

Itemizing Deductions

- ☐ Forms 1098 or other mortgage statements
- ☐ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ☐ Real estate and personal property tax records
- ☐ Invoice showing amount of vehicle sales tax paid
- ☐ HUD statement showing closing date of home purchase
- ☐ Cash amounts donated to houses of worship, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- ☐ Amounts of miles driven for charitable or medical purposes
- ☐ Expenses related to your investments
- ☐ Amount paid for preparation of your prior year tax return
- ☐ Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- ☐ Job-hunting expenses

Estimated Tax Payments

- ☐ Amounts paid and payment dates for federal tax estimates
- ☐ Amounts paid and payment dates for state tax estimates
- ☐ Amounts paid and payment dates for city tax estimates

IRA Information

- ☐ Amount contributed
- ☐ Traditional IRA basis
- ☐ Value of IRAs

In addition, if you can answer "yes" to any of the following questions, please provide all related documents:

- Were there any births, deaths, adoptions, divorces or marriages in your household?

- Did you convert a traditional IRA to a Roth, or re-characterize a Roth back to a traditional IRA?
- Did you receive tip income?
- Did you receive a notice from the IRS, state or local taxing agency regarding a prior year tax return?
- Did you receive installment payments on property sales?
- Did your children under 14 years of age receive investment income?
- Did you support anyone other than your own children?
- Did you make gifts to any individual other than your spouse? If so, what was the value?
- Did you have a foreign bank account?
- Schedules K-1 from partnerships, S-corporations, trusts or estates.
- Summary of casualty losses from fire, theft or natural disaster.
- Did you receive money from any other source not previously mentioned in this checklist?