

WILLIAMS & ASSOCIATES TAX SERVICES

2715 Ashton Drive
Suite 106
Wilmington, NC 28412

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Personal Tax Organizer

Name: _____ SS#: _____ Date of Birth: _____

Spouse: _____ SS#: _____ Date of Birth: _____

Filing Status: Single _____ Married (Joint) _____ Married (Separate) _____
 Head of Household _____ Qualifying Widow(er) _____

Current Address: _____

Phone & Email: _____

Dependents

Name: _____ SS#: _____ Date of Birth: _____

Name: _____ SS#: _____ Date of Birth: _____

Name: _____ SS#: _____ Date of Birth: _____

Name: _____ SS#: _____ Date of Birth: _____

The following items must be received in our office in order to start your tax return preparation:

- ___ 1) **Signed Engagement Letter**
- ___ 2) Copy of Prior Year's Tax Return
- ___ 3) All income (W-2/1099/K-1)
- ___ 4) Interest Income Statements
- ___ 5) Broker/Dividend Statements
- ___ 6) Mortgage Interest Statement form Bank
- ___ 7) Medical Expense Summary (prescriptions, doctors, hospital, dental, etc.)
- ___ 8) Donation/Contribution Statements
- ___ 9) Amount of property tax paid (real estate & personal)
- ___ 10) Real Estate Closing Statements (indicate date of sales & purchases & price)
- ___ 11) Child Care Expenses plus name, address, & EIN of provider
- ___ 12) All Insurance Payments, including Health
- ___ 13) 1099 or Business Income & Expenses
- ___ 14) If claiming business use of vehicle:
 - a) Year, Make, Model & Cost of Vehicle
 - b) Date first used for business
 - c) Mileage logs for vehicle
 - d) Vehicle Expenses Claimed (Gas, Maintenance, Insurance, etc.)
 - e) If sold, date of sale and sales price

Additional information may be required to complete your return. Please respond promptly so your return can be completed in a timely, efficient manner.