

## DATA AND DOCUMENT SUBMISSION INSTRUCTIONS

Please use paper clips or binder clips to attach documents wherever possible. Your completed tax organizer and all supporting documents will be scanned into our filing system. Staples cause pages to stick together even after the staple is removed.

When providing the required documents listed below, you do not need to fill in all fields on the organizer, we will use the data from respective tax forms.

In an effort to be environmentally responsible we have printed the organizers on both sides of the paper. Please refer to all pages when providing your tax data.

If you paid estimates for tax year 2017, please confirm the amounts provided in the organizer are the actual amounts you paid, notate any changes if necessary. *We will report that all estimates have been paid by you unless you note otherwise.*

If an account or item is listed on the organizer that has been closed or does not apply to the tax year 2017, kindly cross out or indicate the item is no longer relevant. This will avoid delays in completing your return..

The following documents in addition to your completed tax organizer, are **required**, if applicable, in order to complete your return accurately and completely.

- Form(s) W-2, including any corrections on Form W-2C.
- Complete consolidated brokerage form(s) 1099 B - INCLUDING REALIZED CAPITAL GAIN AND LOSS SCHEDULES showing cost basis and date of purchase. (not just gross proceeds schedules).
- Forms 1099 – R, MISC, INT, DIV, B, G, K, C, H, S, and consolidated
- Schedules K-1 (federal and states) from partnerships, trusts, estates and S Corporations.
- Forms 1095-A, 1095-B, 1095-C, if you have received any forms under the ACA, please provide the form to us, you may need to go online to access forms from your healthcare provider. Otherwise, please let us know if you had healthcare insurance and for what months on the organizer.
- Copies of any documents marked “Important Tax Information”
- Any documentation for unusual transactions or those transactions which you are unclear as to where to include in the organizer etc. (for example stock option grants etc)
- Closing (HUD) statements from the sale, purchase or refinance of real estate, including Form 1099-S.
- If this is our first year preparing returns for you, please provide a copy of your prior year federal and state returns, if not previously provided.