HOW TO EFFICIENTLY USE THE ORGANIZER

1. Review and correct the Personal information page and dependent page
2. If there are estimates fill in the date OR tell us if none were paid by marking '0'
3. Add or subtract from the documents from the checklist (and deliver them all)
4. Answer the questionnaire (only yes answers are really needed
5. If you deliver tax docs we don't need the data filled in elsewhere
6. Upload all tax docs –(See the list of usual forms below)
7. Fill in the itemized deduction form
   Deliver Auto donations, Non cash donations over 500 need a letter from the charity

Have a business or rental?

- Fill in Schedule C – Business
- Fill in Schedule E – Rental (new property or sold? Send us the settlement sheet)
- Fill in Schedule F Farm
- Fill in Auto form – (New car? Send us the invoice)
- Fill in Office in home form

OR Typed excel or word doc with the same information

Any tax docs delivered later avoids our automated system and requires us to manually input at an additional fee. Exceptions are Broker statements and 3rd party K-1's

See our pre-visit checklist located here https://smarttaxadvisor.com/tax-related-resources/

Don't mail or deliver original docs you don't want to lose!

The organizer helps us to:

- Avoid messages for missing information
- spotting opportunities to save you tax dollars

The usual tax forms

W-2, W-2G,
1099-INT, 1099-DIV, 1099-B
1098 (Mortgage), 1098-T (tuition) , 1098-E (Student loan interest)
3rd party K-1, HSA forms,
1095-A, 1095-B, 1095 C (Health insurance
Any form that says "do not throw away – Tax document