



INTEGRITY AUDIT & TAX

Organizer

Individual

This organizer is designed to assist you in gathering the information required for preparation of your individual income tax returns.

Please complete all applicable sections. Also, please provide details and documentation as requested (documents may be provided electronically).

The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to taxpayers in an envelope clearly marked "Important Tax Documents Enclosed" and should be submitted with this organizer.

If you are requesting direct deposit of any applicable refunds, please provide documentation, such as a voided check or account card from your financial institution, that provides verification of the bank account and routing number. This will ensure your refunds are deposited into the correct financial account. In addition, please provide a copy of your (and your spouse's, if applicable) driver's license (front and back). This information will be needed to electronically file your tax return.

Also, enclosed is an engagement letter which explains the services that will be provided to you. Please sign a copy of the engagement letter and return it in the enclosed envelope. Keep the other copy for your records.

The filing deadline for your income tax return is April 15, 2021. Any taxes not paid by the filing deadline may be subject to late-payment penalties and interest. If you don't pay a reasonable estimate of your tax liability, your extension may be deemed invalid, subjecting you to late-filing penalties.

Your return will be electronically filed unless otherwise requested or ineligible for e-file. The request to opt out of e-filing may require you to sign a form that will be filed with the taxing authority(ies). We look forward to providing services to you. Should you have questions regarding any items, please do not hesitate to contact 715-670-3066 or email integrityoffice@integrityaudittax.com

Certification:

The undersigned certifies, to the best of his or her knowledge, that the information documented in and provided with this organizer is complete and accurate.

Certified by (taxpayer) _____

Certified by (spouse) _____ (if applicable)

Below is a list of common Tax Forms that. Please utilize this list to organize your tax information. Place a check mark next to the documents you will have for the 2020 income tax return.

- W-2 (wages)
- 1099-G (unemployment Benefits)
- 1099-R (retirement)
- 1099-MISC (per cap, rents, other income, etc.)
- 1099-NEC (self -employment earnings)
- 1099-INT (interest)
- 1099-DIV (dividends)
- 1099-B (brokerage sales)
- 1099 (any other)
- 1095-A (marketplace health insurance coverage)
- 1098-T (education)
- 1098 (mortgage interest)
- Driver's License (both taxpayer and spouse if applicable)
- Schedules K-1 (Forms 1065, 1120-S, 1041)
- Annual brokerage statements
- Closing Disclosure (real estate sales/purchases)
- Other information statements