



# SHARE THE HARVEST PARTNERS LLC

## Harvest Advisors LLC

### Harvest Pension Group, LLC

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## Client Tax Records Organizer

**Name(s)(Type or print)**

**Tax Year:**

Please use this organizer for this year's filing season. Please read carefully. Complete, sign, and date only the worksheets that apply. If you need more space, please copy pages or attach a separate sheet. Please send via mail or bring to in-person appointments.

The information requested by this form will help us evaluate your tax situation and concentrate our efforts in preparing a complete return. **Do not copy information printed plainly on W-2's, 1099's, and other tax reporting statements. Send us copies of the forms instead.**

Please complete the following document checklist. **Copies of documents are best. We do not need originals.**

	<b>First time clients only:</b> Copies of 2 forms of ID, including one photo ID. The IRS requires us to ask for this to help prevent fraud. Copies of 2 IDs for each child for EIC.
	Copy of previous year's tax return (only if not prepared by our firm)
	Forms(s) W-2 received from all employers. Include all copies.
	Forms 1099, & 1095-A/B/C for reporting income from interest, dividends, independent contractors, pensions, IRA's, 403B plans, tax refunds, HSA or MSA medical accounts, cancellation of debt, foreclosure, <b>unemployment benefits</b> , gambling winnings or annuities
	Form(s) SSA-1099 or RRB-1099 for Social Security, SSI, or Railroad Retirement benefits
	Form 1099-B Tax reporting forms from brokerage firms, custodian, or mutual fund company, or other documents for reporting sales of stocks, mutual funds or other assets. <b>Include any Crypto Currency transactions. Reporting rules are tough.</b>
	Form(s) 1098 for reporting mortgage interest, points, college tuition, student loan interest
	Schedule(s) K-1 for reporting partnership, estate, and trust income and deductions
	Statement(s) of gambling winnings, prizes, awards, jury-duty pay, or hobby income
	HUD-1 or other closing statement, if you bought, sold, or refinanced a home
	College account statement(s) showing the dates and amounts actually paid during the year
	Statement(s) showing the amount(s) of Veteran's Benefits or Worker's Compensation Benefits received.
	<b>All letters from the IRS, State or Cities and other taxing agencies</b>
	401k Statements for an optional annual investment review.
	Statements for Energy Improvements. Solar, EV, Windows, etc