MADSEN AND COMPANY
Certified Public Accountants
3557 West 9800 South, Suite 201, South Jordan, UT 84095
(801) 260-1004 Fax (801) 303-7304
www.madsencpa.com

TAX DOCUMENTS CHECKLIST

This checklist is designed to assist you in locating some of the most common tax documents used in preparing your tax returns.

These documents can be uploaded to our secure portal or dropped off at our office.

W-2s (Wages) and W-2G (Gambling)

1099'S forms: interest (1099-INT), dividends (1099-DIV), retirement distributions (1099-R), Social Security benefits (1099-SA), real estate sales (1099-S), cancellation of debt (1099-C), tax refunds (1099-G), HSA distributions (1099-SA), Miscellaneous (1099-Misc), etc.

1098 forms – Includes mortgage interest statements (1098), student loan interest (1098 -E), and tuition statement (1098-T)

K-1s from partnerships, S-corporations, and trusts

Health Insurance coverage forms – Marketplace (1095-A), Individual health insurance coverage (1095-B) and employer-provided health insurance (1095-C) or exemption certificate.

Year-end brokerage (1099-B) or other statements showing investments that you sold (We will also need the purchase date and purchase price or basis for investments sold)

Any settlement or closing documents regarding purchase or selling of your home or other real estate in the past year. Including refinancing documents.

Also remember to include these important items:

Complete our online tax organizer. This can be found on our website www.madsencpa.com on our “Client Area” page.

Annual Tax Engagement Letter–signed. This can be found on our website www.madsencpa.com on our “Client Area’ page or we can send you an Engagement Letter that can be digitally signed. This is needed before we can begin preparing your tax returns.

New Clients also provide us with

Prior year’s tax returns
Copy of driver’s license for taxpayer and spouse

Provide us with any other documents that you think we may need. Especially if it states on the envelope “Important Tax Information”