

Collecting Your Tax Information

Please visit our website www.jordahladvisorygroup.com. You may make changes to your pre-scheduled appointment or telephone/video conference, schedule a new appointment or telephone/video conference and download the following forms and worksheets:

Tax Organizer
Industry Specific Worksheets
Non-Cash Contribution Guide
Medical Expense Deduction List
2008 Employment Forms

We require all of the originals, copies of the originals or a PDF of the originals listed below, as these forms contain important information and ID numbers that are needed in the preparation of your tax return. You do not need to fill in the amounts from these forms on the Organizer. If you provide all tax documents in PDF, you will receive a \$25 discount.

- W2
- W2G (Gambling Income)
- 1099-R (Retirement Benefits)
- 1099-Div (Dividends)
- 1099-Int (Interest)
- 1099-G (Unemployment Compensation)
- 1099-MISC
- 1099-RRB (Railroad Retirement Benefits)
- 1099-SSA (Social Security Benefits)
- 1099-B (Proceeds from Broker or Barter transactions) if the 1099-B does not contain purchase information, you may need to contact your Broker for the cost/basis and date of purchase of the stocks
- Schedule K-1
- Closing or Settlement Statement (Real Estate Sold or Purchased)
- 1098 Mortgage Interest Statement
- Property Tax Statements for 2008 and 2009
- Last paycheck stub from 2008
- Student Loan Interest Statements
- 1098-T (Tuition)
- Child Care Provider Information
- Bankruptcy or Divorce papers
- IRA Year End Statements
- Records of Estimated Taxes Paid
- Adoption Costs
- Sales Tax Paid on large purchases for 2008 (Boats, RV's, Vehicles)

If you prefer the Tax Organizer with your personal 2007 information, please call or email.