

# BASIC ORGANIZER



## INCOME

- EARNED: W-2, 1099-MISC, K-1, Commissions
- UNEARNED: 1099-INT, 1099-DIV, 1099-B, K-1, 1042-S

## DEDUCTIONS

- Medical Expenses
- 1098 – Mortgage – Principal and Leisure Properties
- Property Tax Paid
- Donations

## LIFE CHANGING EVENTS

- Newborn – Adoption and/or New Household Member
- New Job
- Acquired a Property
- Personal Loss (Life)

## FOREIGN CONNECTION

- Foreign-based Bank Accounts, Investment Funds and/or Trusts
- Foreign-based Companies (LLC or Corporation)
- Transactions with Cryptocurrency
- Foreign Real Property