Crawford, Merritt and Company

Certified Public Accountants

For Personal Tax Returns

We strongly recommend uploading your information to us through SmartVault Online Portal.
Paper originals provided to us will be returned to you once your tax returns are completed.

Completing a tax organizer is strongly recommended.

If filing jointly, we need both individual's information.

Below is a list of common information that we need to complete your tax returns.

- ☐ Your full legal name, (as shown on Social Security card) date of birth, SSN
- ☐ Your spouse's full legal name, (as shown on Social Security card) date of birth, SSN
- ☐ Dependent full legal name, (as shown on Social Security card) date of birth, SSN and relationship
- ☐ Forms W2s, 1099s, 1099Rs
- ☐ Copy of voided check for Direct Deposit (refund)
- ☐ Completed Record of payments page for Estimated Tax Paid for Federal and/or State (on our website)
- ☐ IRA, Roth, SEP, 401k Contribution amount
- ☐ Form 1099-SA (Social Security Earnings statement)
- ☐ Form 1098 (Mortgage Interest)
- ☐ Form 1098-E (student loan interest)
- ☐ Form 1098-T (Tuition Payment Statement)
- ☐ Form 1095 or 8962 (Healthcare Forms)
- ☐ Form 1099-G
- ☐ Personal tax returns for prior year (for new client or if not completed by us)
- ☐ Rental Properties
  - Rental Income
  - Rental Expenses
- ☐ Sole Proprietorships (refer to information needed for business tax returns)
  - Business Income
  - Business Expenses

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