



Nelson Company, P.C. Tax Organizer

Do NOT use estimates and please provide copies of forms

NOTE: You do not need to write/type this out, if you provide the statements.

Stock & Digital Currency/Asset Sales - Please include all Forms 1099-B, Forms 1099-DA, and digital transaction summary spreadsheets for the tax year (with this, the below details do not need to be filled).

Name: _____

[illegible]