Tax Documents & Information to Bring
(This is a General Checklist and Not All Inclusive)

Taxpayer's Information

- ☐ Prior Year Tax Return (New Clients Only)
- ☐ Social Security Numbers (including spouse and children)
- ☐ Copy of Driver's License (including spouse)
- ☐ Birthdates (including spouse & children)
- ☐ IDENTITY PROTECTION PIN NUMBER **IF** issued by the IRS

Income Documents

- ☐ Form W-2 from employers
- ☐ Form 1099-NEC (if you are self-employed)
- ☐ Form 1099-G (unemployment received)
- ☐ Form 1099-R (distributions from 401K, IRA, and annuities)
- ☐ Form 1099-SSA (social security benefits statement)
- ☐ Documents from Gambling or Lottery Winnings
- ☐ Any Other Source of Income

Adjustments & Deductions

- ☐ Teacher's Educator Expenses (up to $250)
- ☐ Health Savings Account Documents
- ☐ Contributions Made to IRA and SEP Accounts
- ☐ Self-Employed Health Insurance Premiums
- ☐ Student Loan Interest (form 1098-E)
- ☐ Alimony Paid (need recipients SSN & Date of Divorce)

If You Itemize Deductions on Your Tax Return Include the Following:

- ☐ Medical Expenses Not Reimbursed by Insurance: (doctors, hospitals, lab fees, prescription drugs, co-pays, etc.)
- ☐ Medical Insurance Premiums That are not Through Employment (includes medical, hospital, cancer, prescription drug, vision, dental & long-term care premiums).
- ☐ Mortgage Interest Statement (form 1098)
- ☐ Real Estate Taxes Paid (if not escrowed and shown on form 1098)
- ☐ Personal Property Taxes Paid on Vehicles, etc.
- ☐ Charitable Donations of Cash and Non-Cash. List Separately.

Credits & Market Place Health Insurance

- ☐ Child Care Expenses (need statement from the daycare provider)
- ☐ Education Credit (need the form 1098-T from the school)
- ☐ Form 1095-A-Health Insurance Marketplace Statement

Payments

- ☐ Estimated Tax Payments You Made to Federal and State