

If you are an existing clients only provide what I don't already have on your files.
If you are a new client please provide everything that applies to you.

Click here to watch quick video of what to bring or send to me

Lucy's Tax Service LLC

8402 Bascom , Houston, TX 77080

Cell: 832-215-4140 Ph 713-815-1507 Fax. 1-866-362-3973

Click here to book your appointment first.

Important:

What to Bring to Your Appointment

stimulus check amount received date deposited or a check or debit card

Your current mailing address, cell phone number an email address and direct deposit information for your refund.

your's & spouse & your dependents social and date of birth and identification

Wage statements

W-2s if you send me your last paystub please make sure it is the very last one.

Last year's Federal and State tax return

Self-employment business income and expenses/1099-MISC*/1099K

Commissions received/paid*

Pension, retirement income/1099-R*

Unemployment income/1099-G*
You can log into your account and get the totals paid out to you for 2020 or add up all the payments received.

Canceled Debt Amount/1099-C*
foreclosures and repossessions are taxable income

Social Security income/SSA-1099*

IRA contributions*

Statements on the sales of stocks or bonds/1099-B *

Interest and dividend income/1099-INT/1099-DIV*

Lottery or gambling winnings/losses*

w-2 G

State refund amount/1099-G*

Income and expenses from rentals*

Alimony paid or received*

Record of purchase or sale of residence*

Medical and dental expenses*

FORM 1095-A OBAMA CARE

Real estate and personal property taxes*

State or local taxes paid

Sales tax paid**

Estimated taxes or foreign taxes paid*

Cash and non-cash charitable donations*

Mortgage or home equity loan interest paid/1098*

Unreimbursed employment-related expenses*

Job-related educational expenses*

Educator expenses**

Tuition and Education Fees/1098-T**

Student loan interest/1098-E*

Moving expenses*

Casualty or theft losses*

Child care expenses and provider information*

Receipt(s) for qualified energy efficient home improvements**

* If Applicable

** Provision has expired. May be extended by Congress. Bring just in case.

Don't forget your