

PLEASE REVIEW THIS LIST, INDICATE WHAT APPLIES AND BRING ALL APPLICABLE DOCUMENTS WITH YOU FOR YOUR APPOINTMENT

This is a guide and not an all-inclusive list when in doubt bring the document with you

Personal Information

- Copies of Last 3 years tax returns (If we have not completed your return in the past)
- Social Security Card for tax payers and dependents
- Voided Check for Direct Deposit of any tax return
- Forms 1095
- Current Valid State issued Photo Identification

Income:

- W2 Forms for all tax payers and dependents
- Form 1099-C Cancellation of debt
- Form 1099-G Unemployment income, or state or local tax refunds
- Form 1099-MISC or any Self Employment Income documentation
- Form 1099-R or Form 8606 for payments/distributions from IRAs or Retirement Plans/Pensions
- Form 1099 INT, DIV, B, or K-1s for investment and interest income
- Form 1099 S Sale of property
- Form SSA-1099 for Social Security Benefits Received
- Document of Alimony received or paid
- Business or Farming income – Profit and loss statements, Balance Sheets, Capital equipment information. If you are filing these forms please contact our office for more information on needed documentation
- Rental property income and expenses. Profit and loss statements, or suspended loss information
- If you participated in an instalment sale or need to file forms 6252 (principle and interest collected during the year) please bring the other parties tax ID number (SSN) and their address
- Miscellaneous income; jury duty, gambling winnings, Medical Savings Accounts, Scholarships, Fellowships, etc
- Other sources of Income not mentioned above domestic or abroad

Taxes you've paid

- State and Local taxes
- Real estate taxes paid
- Personal Property Taxes

Adjustments to your income

- Form 1098-E for student loan interest paid or current statements
- Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-secondary education)
- Teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc
- Records of IRA Contributions made during the year
- Any record of energy-efficient home improvements made during the year
- Records of MSA / HAS contributions
- Health Insurance Payment records
- Moving expenses
- Keogh, SEP, SIMPLE, and other self-employed pension plan contributions or distributions

Deductions and Credits

- Child Care Cost: Provider's name, address, tax ID and amount paid
- Education Cost
- Adoption cost: SSN of child, records of legal, medical and transportation costs
- From 1098 : Mortgage interest, private mortgage insurance (PMI) and any points paid
- Investment Interest expenses
- Charitable Contributions, cash amounts, official charity receipts, canceled checks; value of donated property with receipt; miles driven
- Medical and dental expense records
- Casualty and theft losses
- Any miscellaneous tax deductions; Union dues, unreimbursed employee expenses etc
- Records of home business expenses, home size/office size total home expenses.

Other Information

- Estimated Tax Payments made throughout the year
- Prior-year refund applied to current year
- Foreign bank account information for any and all foreign accounts you have ownership in. Peak value of account and any prior FBAR documents filed
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