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Whether you are coming in for an appointment, or dropping off your documents be sure to provide the following if it pertains to you:

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**Basics**

- Proof of Identification (Driver's license or some other government issued ID)
  - Social Security Number (for you, your spouse and any dependents)
  - Date of Birth (for you, your spouse and any dependents)
  - Bank Account Information
  - Identity Protection Pin (if issued)
  - Record of Estimated Tax Payments
  - If you are a new client, the previous year's tax return
  - Any Internal Revenue Service or Department of Revenue letters received
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**Income**

- W-2 Forms
- Unemployment (Form 1099-G)
- Pension/IRA/Annuity (Form 1099-R)
- Year end IRA statements
- Retirement Income (Form SSA-1099)
- Interest & dividend income (Forms: 1099-INT, 1099-OID, 1099-DIV)
- Sales of stock or other property (Forms: 1099-B, 1099-S)
- Gambling winnings (W-2G) & losses
- Sales relating to cryptocurrency
- Self-employed
  - Income (Forms: 1099-NEC, Schedules K-1, other income records)
  - Expenses totaled in accordance with the Schedule C
  - Mileage logs
- Rental Income
  - Income & expense records
  - Rental asset information
- Any other income received
- House closing papers for purchases or sales

## Deductions

- Home (Owner or Renting)
  - Mortgage Interest Statement (Form 1098)
  - Property Taxes paid
  - Rent Paid (Total paid for the year, landlord name & address)
- Donations
  - Cash donations should be accompanied by an acknowledgement letter or cashed check
  - Non-cash donations need a receipt which includes date, item description, value of donation
- Medical
  - 1095-A Health Insurance purchased through the Marketplace
  - Totals paid for doctors, dentists & hospitals
  - HSA Contributions (Form 5498-SA)
  - HSA Expenses (Form 1099-SA)
- Educator Expenses- receipts for classroom expenses
- Childcare Expenses
  - Fees paid to a licensed day care center or family day care for care of an infant or preschooler
  - Amounts paid to a baby-sitter or provider care of your child under age 13 while you work
  - Expenses paid through a dependent care flexible spending account at work
- Educational Expenses
  - Tuition Statement (Form 1098-T)
  - Paid student loan interest (1098-E)
  - 529 Plan Contributions

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## Misc.

- If your dependent had income have their income total with you.
- Bring anything that says "IMPORTANT TAX DOCUMENT"

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**We would rather you bring too many documents than too little, so please bring any documents that you feel may be of use.**