

What to bring to your tax appointment...

All forms of income

| | |
|-----------------------------------|--|
| W-2 (wages) | 1099-INT (interest) |
| 1099-DIV (dividends) | 1099-B (proceeds from Broker or barter transactions) |
| 1099-R (pensions and IRA distr) | Schedules K-1 from partnerships, S Corp, estates and trusts, and other income. |
| 1099-K (Credit Card income) | Internet Income - |
| Social Security SSA 1099 | Amazon, Paypal, Shopify |
| Unemployment and State Refund | Etsy and others |
| 1099-G | Disability Income |
| Education 1098-T, College | Gambling |
| Student Loan Interest, Form 1098E | W-2 G |
| Mortgage Interest, Form 1098 | |

_____ All income information for your children, including full name, date of birth and social security number. If you have prepared their return, bring a copy too.

_____ Cash contributions. Any cash contribution greater than \$75 you should have received a receipt. Please bring your receipts.

_____ Non-cash contributions. This deduction should have been calculated using Fair Market Value (FMV), check our website for estimates. You should include date of contributions, Name of donee, address and FMV.

_____ If bought, sold or refinanced real estate, bring a closing statement for the transactions.

_____ All **tax statements** from your investment brokers.

_____ If you have Marketplace purchased health insurance, please provide your 1095A.

_____ Rental property income and expenses for the year.

_____ Self-employment income and expenses for the year.

_____ Mileage figures for any vehicle usage, including total, commuting, and business mileage.

_____ All legal documents for formation, sale or purchase of a business during the year.

_____ All legal documents for divorce decrees. Copy of Form 8332, to claim children on your tax return.

_____ Copy of any federal, state or local tax correspondence during the year, including all payments made or refunds received.

_____ Records of any estimated tax deposits made for tax year.

_____ **NEW CLIENTS:** Copies of prior year federal and/or state returns, depreciation schedules if applicable, for at least one year). Children's birth certificates and social security cards. Copies of taxpayers driver's license.