

Tax Return Checklist

Please provide the following documentation to us for preparing your standard income tax return

PERSONAL:

- Copy of current state-issued driver's license (if not already on file)
- Identity Protection PIN (ID PIN) – if you have one
- Name(s), Social Security number(s) and date(s) of birth for all dependents
- Copy of previous year's federal and state tax returns – new clients only
- Voided check for direct deposit or withdrawl



Basic Documentation

INCOME:

- W-2s
- 1099 NEC
- 1099 INT
- 1099 D Dividends
- 1099 R Retirement Distribution
- SSA-199 Social Security Benefit Statement



EXPENSES:

- 1098-T Tuition Statement
- 1098-E Student Loan Interest



DEDUCTIONS:

- Mortgage Interest Statement
- Charitable Donation Receipts (cash or non-cash)
- Child Care Expenses
 - Amount
 - Facility Name and Address
 - Employer Identification Number



TAXES PAID:

- Real estate
- Car tax



Additional Documentation You May Have

INCOME:

- 1099-B Stock Proceeds/Transactions
- 1099-G Unemployment
- 1099-Q Educational Account Distribution
- K1 Schedule
- W-2G Gambling Winnings



CONTRIBUTIONS:

- 529 Plan
- Roth/Roth IRA
- Other



DEDUCTIONS:

- Major medical, dental and eyecare expenses (unreimbursed)
- Stock basis against stock sold
- HUD Closing Statement for home sale
- Mortgage refinance statement



TAXES PAID:

- Investment property taxes
- Estimated tax payments (federal and state)

