

- NEW CLIENT? Copy of last years return, dates of birth for yourself, spouse and dependents
- Estimated tax payments, if any · Wage and Tax statements (W-2) · Bank Interest Income (1099-INT) · Investment Interest Income (1099-INT) · Dividend Income (1099-DIV) · Pension Income (1099-R) · Unemployment Compensation (1099-G) · Social Security Benefits (SSA-1099) · Distributions from Profit-Commissions-Independent-Contractor Self Employment income and expenses · Railroad Retirement Benefits (RRTA-1099)
- Long Term Care Insurance Premiums (even if you don't itemize)
- Rental property income and expenses
- Any K-1's from Partnerships or S-Corp income. (Also need Statement A for QBI & Basis Worksheet) · Any K-1's from Trust or Estate Income
- Did you sell any real estate; securities: stocks, mutual fund shares, etc? You will need: · Any 1099-B's from Brokerage accounts ⊢ Date of sale and sales price ⊢ Records of date of purchase and original cost ⊢ Cost of improvements (real estate) · Did you sell your personal residence? You will most likely not have to report this, but please bring in: ⊢ 1099-S Proceeds from Real Estate Transactions ⊢ Closing statement from original purchase of home ⊢ Closing statement from sale of home ⊢ Records of any improvements · Did you buy a personal residence? Please bring in the closing statement for all transactions
- Charitable Contributions? Will need receipts.
- Any HSA contributions made on your own (Not through your employer) · Educators -Classroom expenses incurred · IRA/SEP/ KEOGH contributions/rollovers/ withdrawals · Gambling/Lottery Winnings (W2-G)
- Child care expenses so you could work or go to school - need name, address, SSN, and full amount paid to each day care provider even if you did pre-tax
- National Guard & Reserve Members – Travel expenses for overnight meetings more than 100 miles from home. · Jury pay - prizes - awards · Any other income from any other source! · Do you make payments on Student loans? Form (1098E)
- Adoption expenses · Did you sell or trade in any business assets e.g., car, computer, rental property? You will need: ⊢ Date of purchase and original cost ⊢ Records of prior depreciation-for a vehicle you will need prior mileage information ⊢ Any settlement statements ⊢ Date of sale and amount sold for
- Do you pay any higher education tuition for yourself, your spouse, or your dependents? I cannot process the return without a 1098-T. Bring book receipts separately.
- Are there any contributions to or distributions from state tuition programs? Form (1099-Q)
- Are you enrolled in the Health Insurance Marketplace? I will need Form 1095-A. I cannot process the return without this. To itemize your deductions, we will need: · Out of pocket medical expenses (must exceed 7.5% of income to help) Health Insurance counts only if not paid through a pre-tax payroll deduction. Medical expenses includedoctor, dentist, hospitals, co-pays, prescriptions, X-rays, contacts,

glasses, longterm care insurance, etc. Anything medical. · Home mortgage interest (1098) · Real Estate/Personal property tax receipt