



The following is a list of some common items needed to complete tax returns (not all apply)

PERSONAL INFORMATION

- ☐ Last Year's Tax Return (*required* for new clients).
- ☐ Social Security Numbers and Birth Dates (all individuals listed on the tax return).

INCOME

- ☐ W-2 from *all* employers
- ☐ 1099-Misc. – For self employed / small business owners please refer to our Business Organizer
 - o Records of all expenses
 - o Business Assets
- ☐ Schedule K-1 from partnership, S-Corp, or Trust
- ☐ 1099-G form - Unemployment Compensation and or State Tax Refund (available online)
- ☐ 1099-R form from Retirement Disbursements
- ☐ 1099-SA Form - Social Security/RRI Benefits
- ☐ 1099-INT Form - Interest income statements
- ☐ 1099-DIV Form - Dividend income statements
- ☐ 1099-B Form - Proceeds from stock transactions
 - o Must include cost basis (purchase price)
 - o If there are multiple stock sales a digital copy of the 1099-B may be required
- ☐ W-2 G Form for gambling winnings
 - o Provide total losses
- ☐ Alimony Received
- ☐ 1099-S Form - Sale of Real Estate - you will need to have the cost basis (purchase price)
- ☐ Rental Property Income
 - o Record of income and expenses (Please see our worksheet in the Client Organizer)
 - o Rental asset information (cost, date placed in service, etc.) for depreciation purposes

DEDUCTIONS / ADJUSTMENTS / CREDITS

- ☐ 1098-Form - Mortgage Interest Statement
 - o If real estate taxes not paid through escrow please provide total amount paid
- ☐ Real Estate Tax Paid (all properties)
- ☐ Estimated Income Tax Payments Federal & or State (provide dates)
- ☐ Alimony Paid (name, social security number & address of the recipient required)
- ☐ 1098-T - Education Expenses from Qualified Institution
- ☐ 1098-INT form - Student Loan Interest Paid
- ☐ Childcare Information: name of provider, address, social security number and amount paid
- ☐ Traditional IRA Contribution Amounts; IRA, SEP, or Keogh (If you made a contribution, how much?)
- ☐ Medical Expenses (must exceed 10% of your adjusted gross income)
- ☐ List of work expenses not reimbursed by your employer
- ☐ Job search costs
- ☐ List of charitable expenses cash or non –cash