

# Lustrova Tax Concierge

Your Royal Filing Experience: Required Tax Documents

*Please complete all sections before your appointment. Save and email this form back to Lustrova Tax Concierge.*

Document / Form	Upload Status	Notes
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## Personal Information

- Photo ID (Driver's License, Passport, or State ID)
- Social Security Cards or ITIN Letters
- Bank Account Info (Routing & Account Numbers)
- Previous Year's Tax Return
- Health Insurance Form 1095-A, B, or C

## Income Documents

- W-2 (All Employers)
- 1099-NEC / 1099-MISC / 1099-K (Contractor or Gig Work)
- 1099-R (Retirement or Pension)
- SSA-1099 (Social Security Income)
- Schedule K-1 (Partnership or S-Corp Income)

## Expenses & Deductions

- Self-Employed Receipts & Expense Logs
- Home Office Expenses (sq ft, rent, utilities)
- Charitable Donations Receipts
- Childcare Expenses (Provider Info & EIN)
- Education Expenses (1098-T, Tuition Receipts)

## Dependents & Credits

- Birth Certificates or Custody Agreements
- Proof of Residency (School or Medical Letters)
- Education Credit Forms (1098-T)

## Finalization & Signatures

- Form 8879 – e-File Signature Authorization
- Form 7216 – Disclosure Consent
- Form 13614-C – IRS Intake Form
- Lustrova Tax Concierge Client Intake Form
- Engagement Agreement / Terms of Service

### Client Acknowledgment

I confirm that all required documents have been submitted and are accurate to the best of my knowledge.

Client Signature:

Date Submitted: