

# 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
<b>Personal Information</b>		
<ul style="list-style-type: none"><li>■ Photo ID (Driver's License, Passport, or State ID)</li><li>■ Social Security Cards or ITIN Letters</li><li>■ Bank Account Info (Routing &amp; Account Numbers)</li><li>■ Previous Year's Tax Return</li><li>■ Health Insurance Form 1095-A, B, or C</li></ul>		
<b>Income Documents</b>		
<ul style="list-style-type: none"><li>■ W-2 (All Employers)</li><li>■ 1099-NEC / 1099-MISC / 1099-K (Contractor or Gig Work)</li><li>■ 1099-R (Retirement or Pension)</li><li>■ SSA-1099 (Social Security Income)</li><li>■ Schedule K-1 (Partnership or S-Corp Income)</li></ul>		
<b>Expenses &amp; Deductions</b>		
<ul style="list-style-type: none"><li>■ Self-Employed Receipts &amp; Expense Logs</li><li>■ Home Office Expenses (sq ft, rent, utilities)</li><li>■ Charitable Donations Receipts</li><li>■ Childcare Expenses (Provider Info &amp; EIN)</li><li>■ Education Expenses (1098-T, Tuition Receipts)</li></ul>		
<b>Dependents &amp; Credits</b>		
<ul style="list-style-type: none"><li>■ Birth Certificates or Custody Agreements</li><li>■ Proof of Residency (School or Medical Letters)</li><li>■ Education Credit Forms (1098-T)</li></ul>		
<b>Finalization &amp; Signatures</b>		
<ul style="list-style-type: none"><li>■ Form 8879 – e-File Signature Authorization</li><li>■ Form 7216 – Disclosure Consent</li><li>■ Form 13614-C – IRS Intake Form</li><li>■ Lustrova Tax Concierge Client Intake Form</li><li>■ Engagement Agreement / Terms of Service</li></ul>		

### **Client Acknowledgment**

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

Client Signature:

Date Submitted: