This Checklist is Courtesy of:

Richard Tax Service

441 Prescott Street

New Bedford, MA 02745

(508) 995-2783

Please bring the following applicable documentation to your tax interview:

Personal & Other Information:

• Social Security numbers (taxpayer, spouse & all dependents)

• Driver's License(s)

• Dates of Birth (taxpayer, spouse & all dependents)

• Last Year's Federal & State Tax Returns (new clients only)

• Banking Information if Direct Deposit of Your Refund is Desired

- IMPORTANT - Proof of Health Insurance

Reporting Statements for the Following Income:

• Wage Statements (W-2)

• Interest Income (1099-INT)

• Dividend Income (1099-DIV)

• State Income Tax Refund Amount (1099-G)

• Pension or Retirement Income (1099-R)

• Sales of Stocks, Bonds, Mutual Funds (1099-B) (crypto currency transactions)

• Royalty Income (1099-MISC)

• Digital Payment Apps (1099-K)

• Partnership, Trust, Estate & S-Corporation Income (Form K-1)

• Social Security Statements (Form SSA)

• Gambling & Lottery Income (W2-G)

-including detailed records of all winnings and losses during the year

• Unemployment Compensation (1099-G)

• Contract Income (1099-NEC)

Income related to the following:

• Alimony Received/Paid (divorce prior to 2019)

• Prizes, Bonuses, & Awards

• Unreported Tips

• Jury Duty

• Exempt Interest

• Foreign Income

• Other Income (including Non-taxable)

Income & Related Cost or Expense for the Following:

(Note: do not deduct cost or expenses from income furnish them separately; if you are a new client, also furnish depreciation worksheets for applicable property)

• Self-employment

• Real Property Sales

(Furnish closing papers for both purchase & sale)

• Installment Sales

• Rental Activities

• Farm & Ranch Operations

Adjustments, Deductions, Credits & Payments for the Following:

• Contributions to IRA's & Other Retirement

• Student Tuition (1098-T)

• Education Expenses

• Student Loan Interest (1098-E)

• Educator Expenses

• Medical/Dental Expenses

• Real Estate Taxes Paid

• Sales Taxes Paid

• Mortgage or Home Equity Loan Interest Paid (1098-)

• Documentation of Energy Efficient improvements made to home

• Cash & Noncash Charitable Contributions

(Provide documentation with dates from each organization)

• Child Care Expenses

(List separately for each child; include name, address, Fed. ID. number & amount paid to each provider)

• Gambling & Lottery Expenses

(Provide only to offset gambling & lottery income)

• Estimated Tax Payments

(Provide dates & amounts for each payment)