

What Do I Send You?

For New Clients

- Driver's License or other Picture ID for Taxpayer & Spouse
- Social Security Card for each person listed on return
- Birthdates for everyone on the return
- Copy of prior year's tax return with all pages & schedules

For ALL CLIENTS

- W-2 Forms for taxpayer and spouse (How many should we find? ____)
- 1099-MISC forms
- 1099-A – Abandoned Property
- 1099-B from Brokerage if you sold stocks or bonds (Sometimes part of a “Consolidated 1099”)
- 1099-C - Canceled debt
- 1099-G for unemployment benefits received
- 1099-G for state refunds received
- 1099-H - Health Credit Advance Payments
- 1099-INT – Interest from a bank or brokerage
- 1099-DIV – Dividends from a brokerage
- 1099-MISC – Rental payments, non-employee income, or other income
- 1099-K – Credit Card receipts
- 1099-PATR – Patronage Dividends
- 1099-R – Retirement distributions, pensions and annuities
- 1099-S – Sale of Real Estate, including your home
- 1099-HSA
- SSA-1099
- 1099-Q
- K-1 from a Partnership (1065), S-Corporation (1120-S) or Trust (1041) (How many should we find? ____)
- 1098 (Mortgage Interest)
- 1098-E 1098-T (Education expenses and student loan information)

- Closing Statements If you bought or sold real estate
 Note: If you sold real estate during the year, you may need the statements from when you bought the property as well.

- Rental Records if you had rental property
- Business Records if you owned a business
- QuickBooks files (either *.QBA accountant or backup files)

GENERAL Items

- Moved during the year
- Worked in more than one state during the year
- Added or Removed a person from prior year
- Married or Divorced during the year
- Taxpayer, Spouse or Child attended college

INCOME Items

Taxpayer Spouse

- Worked for someone that did not give you a W-2 or 1099
- Worked outside the United States for any part of the year or all year
- Have a brokerage account
- Have investments outside the United States
- Sold or paid for something using Virtual Currency (Bitcoin, Ethereum, Ripple, etc)
- Received or Paid Alimony or Spousal Support
- Own an interest in a Publicly Traded Partnership (such as Energy Transfer Partners)
- Own a Farm
- Own Rental Property
- Sold a Property or other Real Estate
- Received an inheritance

ADJUSTMENTS TO INCOME

- Had expenses as an educator/teacher
- Expenses as a Military Reservist
- You are a Performing Artist
- Made a contribution to a Health Savings Account (HSA)
- Made a contribution to an SEP, SIMPLE or IRA
- Paid Tuition and Fees for College
- Made payments on a Student Loan

DEDUCTIONS

- Property Taxes paid
- Mortgage Interest
- Charitable Contributions
- Purchased a car, boat or other big-ticket item during the year

TAXES and CREDITS

- Paid for Dependent Care (Children or Elderly)
- Purchased solar energy equipment for your home
- Purchased any of the following: Electric Heat Pump, new central A/C unit, new Water Heater, Biomass furnace or stove
- Purchased any of the following: Insulation material, exterior doors, energy-efficient windows and skylights; new Energy Star roofing materials
- Paid back all or part of a First-time homebuyer credit
- Made ESTIMATED TAX PAYMENTS -

What did we forget to ask about?