Please initial indicating you have reviewed this checklist

_____ _____

Sheila Hinson

Tax Preparation

Checklist of Things to Bring/Send to Your Tax Appointment

☐ **Documents with current information is required. Documents need to be uploaded through a secure link that has been sent to your email address.**

☐ Last year's tax return *(new clients)*

☐ Driver's license or passport (copy only if sending)

☐ Social Security numbers and dates of birth for all dependents

☐ W-2 forms for wages (must be IRS approved)

☐ 1099 forms for interest, dividends, retirement, unemployment, stock/mutual fund sales, gambling and other income

☐ Yearend statements from mutual funds and brokerage accounts

☐ IRA year end statements

☐ K-1 forms from partnerships, S-corporations, estates and trusts

☐ Rental or self-employment income and expenses

☐ Purchase and sale information for anything sold during the year (car, eBay, etc.)

☐ Closing document/HUD statement from purchase, sale, or refinance of your home

☐ Information relating to foreign income

☐ All other statements of income

- ☐ Medical expenses *(if anticipated to exceed 7.5% of your income)*
- ☐ 1099-SA from Health Savings Accounts
- ☐ **Health Insurance Verification Forms (Form 1095-A)**
- ☐ Records of estimated taxes paid (dates and amounts)
- ☐ Property tax statements
- ☐ 1098 forms for mortgage or student loan interest
- ☐ Donations of money to charity *(letter from organization)*
- ☐ Donations of property to charity *(letter from organization if any single gift exceeds $250 in value)*
- ☐ Volunteer expenses and mileage
- ☐ Amounts paid for higher education & student loans
- ☐ Job related expenses - unreimbursed (union dues, safety gear, conferences, legal fees, mileage)
- ☐ Investment related expenses
- ☐ Child care provider's name, address, taxpayer identification number, and amount paid (including amounts paid for summer day camp)
- ☐ Banking Information