



!!!!VERY IMPORTANT!!!!

NEW AND RETURNING CLIENTS: We need a copy of all applicable SS Cards, Drivers License or IDs as well as your last filed year tax return and the amount of your refund.

***New IRS requirement on claiming dependents we will need either of these documents:
Schools records, copy of the 1st page of your lease contract, medical records, adoption or child placement records, birth certificate, a letter on official letterhead from place of worship.***

- **W-2(s), 1099-MISC**, or figures from last check stub(s) received. I must have your *entire* year to date activity... YTD Gross Taxable Federal and State earnings & YTD Fed/State Withholding's, etc... . Provide your employers' FEIN(s) (Federal Employer Identification Numbers. Your previous years W-2 or your payroll department should have that info. It's usually 9 digits and separate from your employee number). Contributions to Individual Retirement Account not through an employer?
- **Side or Odd Jobs (Sole Proprietorship)** *regardless if you were compensated or not.* Example: child care as babysitting friends/relatives/elderly, tutor, general labor, artist, construction, yard work, janitorial, auto repair, provided housing for friends/relatives, commodity sales or distribution, etc.
- **Any & All Income** earned outside of wages/salary such as: retirement distributions, annuities, pensions, small business earnings/losses, investment earnings/losses (Capital gains/losses), interest income/losses (please include previous years if any!), stock or dividend payouts, home sale(s), unemployment, etc... (1099-INT, 1099-DIV/B, 1099-R, 1099-Misc, 1099-G, 1099-C (Cancellation of debt/loan), and W-2 G, are some examples). For all 1099-Misc forms please provide an explanation of the compensation (ex...Provide a service, Employer Compensation, Royalties, Rents, Commission, etc...)
- **Daycare** name(s) and expenses with care providers ID#, address, and name.
- **Residence** Indicate whether you own, buying, or renting, (*if renting monthly amount*). If homeowner: include approximate square footage, home improvements, repairs, maintenance costs. Mortgage interest statement amounts and property taxes paid (Usually found on form 1098 or invoice statements).
- Estimates of your monthly utilities (light, phone, gas, internet, cable, water, cell, etc...)
- Estimates of monthly car note
- Estimates of insurances not covered by your employer (home, auto, life, renters, etc...)
- **Misc. Expenses** medical expenses, sales taxes, charitable contributions, church offerings, tithe amounts, legal fees, expenses; personal and associated with employment (car rentals, vacations, lodging, tolls, travel expenses, etc...)
- **Send 1098-T for student(s)**

Be sure to ask about our other services: Credit Repair, Notary and Life Insurance!!!

**Diamond Integrity Tax Services
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