

Client Information Preparation List

What is needed for your tax preparation.

I will need your legal name, social security #, date of birth, State ID (ie Driver's license), current address, filing status (single, joint, MFS), the names and social security # of any spouse and or dependents.

All of the following (if you have them):

- W-2's
- 1099's (Misc. Int, Div. G, B, C & R)
- 1098's
- 1095A
- Foreign Income/Tax Statements
- Mortgage Interest
- Student Loan Interest
- Tuition expense form
- Child Care Expenses (including business name & EIN number)
- If you sold any stock or Real Estate, the paperwork for that
- Any Charitable Contributions over \$250 (total) I will need the name of the organizations and the amounts

If you are and independent contractor, have 1099 Misc.'s, or have an LLC, I will also need: a complete Business Expense Deduction List or a spreadsheet with everything totaled by category.

*If you are a new client, or I did not prepare your tax returns last year, please send a copy of last year's tax return if you have them.