



Basic Info

- Name, SSN or ITIN, and Date of Birth
- Last Year's Return
- Estimated Taxes Paid

Documents Received

- Form W-2s - wage and tax statements
- Form 1095s – includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)
- Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)
- Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)
- Form 2439s - notice to shareholder of undistributed long-term capital gains
- Schedule K-1s - partnership, S Corporation and estate or trust income

Personal Records

- Child and Dependent Care Expenses
- Education Expenses
- Medical Expenses
- Vehicle (Personal Property) Taxes Paid
- Real Estate Taxes
- Mortgage Interest Paid
- Charitable Contributions
- Business or Employee Expenses
- Gambling Expenses
- Investment Transactions
- Retirement Contributions
- Foreign Earned Income and Foreign Taxes Paid
- Moving Expenses

E-File/Print

- Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
- Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)
- Driver's license
- IP Pin (if required)

Deadline to File: 4/15; if extended, the new due date is 10/15

If you would like us to file an extension on your behalf, let us know two weeks before the first quarter deadline.
Please have all documents to us a minimum of five weeks prior to the due date.