

Info@MichaelAubut.com

407-434-1777



Needed - for each person (including children) Standard list:

- Full name
- Dates of birth
- Social security number
- phone number (& cell carrier for texts from IRS)
- email address
- copy of last year's 1040 (complete)
- all W2's
- all 1099's
- any other income documentation
- 1098 for homeowner interest
- 1095-A or B health insurance marketplace statement
- property tax bill
- itemized list of charitable donations
- any other forms or documents received that refer to taxes on the envelope