FORMS NEEDED TO PREPARE YOUR TAXES: **CLIENT NAME:______________**

- W-2 ________ SELF ________SPOUSE
- Interest Income, Dividend Income, Reports from stock accounts
- Mortgage interest/property tax statements (FORM 1098)
- 1099's - (R-retirement fund, INT-interest income, DIV-dividends, MISC-miscellaneous, G-government/unemployment, SSA-social security statement, B-stock sales (need cost basis)
- Bank Information – Routing # and Account # (direct deposit of refund)

Routing:________________________________Acct:_______________________________

- HSA- Health savings accounts
- K-1's-Corporations, Partnerships
- W-2G- gambling income
- Additional dependents Name____________________________ DOB________________ SSN_______________
- College Tuition statements or interest on tuition (form 1098-T)
- Childcare information – Name of Caregiver__________________SSN/EIN__________________

  Address____________________________________ Total paid___________________

- Proof of Insurance (form 1095-A, B, or C). Only if you've received it. Most will be late this year.

ADDITIONAL IF APPLICABLE:

- Donations receipts
- Medical insurance paid (out of pocket and Medicare on your SSA statement
- Vehicle registration
- LIST of Expenses IF self-employed and/or home office
- Long Term Care Insurance
- Medical bills, prescriptions -TOTAL AMOUNT will need to exceed 10% of income
- Medical Miles if medical exceeds 10% of income
- Traditional IRA contributions
- LIST of work expenses if required for work