FORMS NEEDED TO PREPARE YOUR TAXES – 2 Pages

CLIENT NAME(S): ____

PHONE NUMBER: ____

❒ Identification for Taxpayer and spouse

❒ W-2 ________ SELF ________SPOUSE

❒ Copy of last year's taxes – if you are a new client.

❒ Unemployment Form 1099G, if applicable

❒ 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_______________

Name____________________________ DOB________________ SSN_______________

Name____________________________ DOB________________ SSN_______________

❒ College Tuition statements or interest on tuition (form 1098-T)

❒ Any letters from IRS or State taxing agencies

❒ Energy Efficient Home Improvements – include invoices

❒ Childcare information –

Name of Caregiver ___________________________ SSN/EIN________________________

Address_______________________________________ Total paid____________________

❒ Proof of Insurance form 1095 only for Marketplace insurance

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 7.5% of income

❒ Medical Miles, if medical exceeds 7.5% of income

❒ Traditional IRA contributions