FORMS NEEDED TO PREPARE YOUR TAXES – 2 Pages

CLIENT NAME(S): ____

PHONE NUMBER: ____

❐ Identification for Taxpayer and spouse

❐ W-2 ________ SELF ________SPOUSE (include any attachments for overtime and tips)

❐ 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 (Form 1099-B, INT, DIV)

❐ Mortgage interest/property tax statements (FORM 1098)

❐ 1099's - (R-retirement fund, NEC-non-employee compensation, MISC-miscellaneous, G-government/unemployment, SSA-social security statement, 1099-K for income)

❐ Bank Information – Routing # and Account # (direct deposit of refund)

Routing: ___________________________________ Acct: ______________________________

❐ HSA- Health savings accounts Form 1099-SA

❐ 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

❒ Car loan interest if applicable under the new Tax Bill

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