Wright's Tax Service Documentation Checklist

☐	All copies of W-2s from employers.
☐	All copies of 1099s (interest, dividends, stock sales, unemployment comp., state tax refund, social security benefits).
☐	All 1098s, year-end statements of mortgage loans. Include any refinanced or paid off during the year and any equity loans.
☐	Paper work for any transfers of IRAs or pension plans. Any amounts you invested in an IRA during the tax period and year end balances.
☐	Copy of a valid driver's license, state issued ID card or passport and social security card is required.
☐	Copy of social security card and date of birth for all dependents. Proof of right to claim dependent(s); i.e. medical and/or school records, employer statement, Form 8332 if you are not the custodial parent.
☐	Name, address, phone number, social security/tax identification number and amounts paid to any child care providers.
☐	All receipts of cash contributions you have given to non-profit (charitable) organizations. (All amounts must be totaled)
☐	Non-cash contributions when totaling more than $500, you need to provide original value, date acquired, ending value, and date contribution was made.
☐	If you are self-employed, bring a list of income and expenses related to this business. If you have employee business expenses, list them. (All amounts must be totaled)
☐	If you have rental property, bring a list of income, expenses and any improvements. (All amounts must be totaled)
☐	If you made any federal and state estimated tax payments, the date and amount of each payment (receipts, if available).
☐	If you purchased a house or refinanced a mortgage in the tax period, please bring a copy of your settlement (HUD-1) or closing statement.
☐	If you purchased a new vehicle in the tax period please provide a copy of the sales receipt..
☐	If you, your spouse or your dependent(s) attended college in the tax period, please provide a copy of the 1098-T Form - Tuition Statement.
☐	Any other documents you feel may be needed, to include student loan interest, medical bills, etc.
☐	If you had insurance under the Affordable Care Act, please submit Form 1095-A