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Trust. Simplicity. Transparency.

Thank you for choosing Aldom Professional Accounting & Tax Services.

We thank you for choosing us and are looking forward to servicing you. In our best efforts to make this process a simple one, we've compiled a list of common documents required (it is not typical for all to apply). This list is used only as a reference point and will vary from client to client. Additionally, it is common for certain information to be listed on prior-year returns in which duplicate copies are not necessary. Any questions or concerns, please call our office at 708.529.7303

Thank You,
Jessica

General

- Government Issued ID
- Prior year return (up to three years)
- Bank Account # and routing #
- Dependents name, birthday and relationship (with documentation)

Income Information

- W-2 Forms from ALL employers you (and your spouse, if filing a joint return) worked for during the previous tax year
- 1099 Forms if you (or your spouse) completed contract work and earned \$600 or more.
- Investment income information (including: interest income, dividend income, proceeds from the sale of bonds or stocks, and income from foreign investments).
- Income from local and state tax refunds from the prior year
- Business income (accounting records for any business that you own)
- Unemployment income

- Rental property income (accounting records for any activities throughout the year)
- Social Security benefits
- Miscellaneous income (including: jury duty, lottery and gambling winnings, Form 1099-MISC for prizes and awards, and form 1099-MSA for distributions from medical savings accounts.)

Income Adjustments

- Homebuyer tax credit
- Green energy credits
- IRA contributions
- Mortgage interest
- Student loan interest
- Medical Savings Account (MSA) contributions
- Self-employed health insurance
- Moving expenses

Credits & Deductions

- Education costs
- Childcare costs
- Adoption costs
- Charitable contributions/donations
- Casualty and theft loss
- Qualified business expenses
- Medical expenses
- Job and moving expenses

All documents can be delivered in person or securely uploaded to our online portal using your unique ID and password. The link to our secure portal is available below and can also be found on our website at:

www.aldomgroup.com

Secure Portal: <https://www.encyro.com/aldomgroup>