

 **Income Documents** Please include all applicable income sources:

Employment

W-2 forms from all employers

Self-Employment / 1099-NEC or 1099-MISC

Gig / Platform Work Uber, Lyft, DoorDash, Etsy, eBay, Payout reports or 1099-K forms

Unemployment

1099-G for unemployment compensation / Tax refund 1099-G

Retirement & Social Security

1099-R (pensions, annuities, or IRA distributions)

SSA-1099 (Social Security benefits)

Investments & Savings

1099-INT (interest)

1099-DIV (dividends)

1099-B (stock or crypto sales) & Sch D Year-end brokerage statements

Other Income

Alimony received (if applicable)

Gambling winnings (W-2G)

Jury duty, prizes, legal settlements

Foreign income or assets

 Deductions & Expenses

Home & Property

1098 Mortgage Interest Statement

Real estate and property tax bills

Home purchase/sale documents (HUD-1 or closing statement)

Education

1098-T (tuition statements)

Student loan interest (1098-E)

Receipts for qualified education expenses

Childcare

Provider's name, EIN or SSN, **phone number** and total paid

Dates of care and amounts

Retirement Contributions

Traditional IRA or Roth IRA contributions

HSA contributions (Form 5498-SA or bank records)

If itemizing deductions or qualifying for credits, include:

Medical Expenses

Out-of-pocket medical/dental expenses (not reimbursed)

Prescription costs

Health insurance premiums (if not through employer)

Mileage

Charitable Contributions

Cash donations (with receipts or bank statements)
Non-cash donations (Goodwill, Salvation Army, etc.) with item list and valuation (receipt must be uploaded with e-filed tax return)

State & Local Taxes

DMV registration fees license portion (if deductible)
State tax payments (including estimated or prior-year payments)

If You Own a Business or Rental Property

For each business or rental property:

Income received
Categorized list of expenses (utilities, insurance, travel, advertising, etc.)
Major asset purchases for depreciation
Business-use vehicle logs
Home office calculations (sq. footage of office and home)
Business income & expense summary (spreadsheet or software reports)

Crypto, NFTs, and Digital Assets

If you bought, sold, traded, or received crypto/NFTs:

1099-B or 1099-K from platforms like Coinbase, Binance, Kraken
Wallet transaction reports or CSV exports
List of crypto received as income (with fair market value at time of receipt)

IRS or State Notices

Please provide copies of any recent correspondence from the IRS or state tax agency, such as:

CP2000 underreporting notices
Identity verification requests
Balance due or refund offset letters
Audit or collection notices

Direct Deposit Information

For refund direct deposit or payment scheduling:

Bank name
Routing number
Account number

(Be sure to verify this information to avoid delays.)

 **You're Ready to Begin!**