



**Information needed from new clients to complete your 2022 tax return.**

- 2022 Tax Questionnaire and Engagement Letter completed
- Copy of 2021 tax return
- Copy of Social Security card(s) and birth certificate(s)
- Copy of your and if applicable your spouse's driver's license also if applicable, identity theft pin(s),
- All income statements (W2, 1099's, retirement, dividends, interest, social security stmt, etc)
- 1099-B Proceeds from Brokerage accounts (If you have more than 20 stock trades, please give us this information in excel or another electronic format if possible)
- K-1 Forms (from corporations, partnerships, LLC, or estates)
- If self-employed we need record of income and expenses (spreadsheet available)
- If you own rental property, we need record of income and expenses (spreadsheet available)
- Other income (such as unemployment, gambling winnings, jury duty, prizes, awards, etc.)
- Home mortgage statements -Form 1098 (If funds were used for anything other than home purchase, please make a notation)
- Property taxes paid and Charitable Donations
- Marketplace Insurance (Form 1095-A)
- Form 1098-T and any other education expenses if you or any dependents attended post-secondary educational institutions
- Childcare expenses with name, address and tax ID number of childcare providers