



List of items you should provide for Income Tax Preparation

1. Social Security Card(s) – Your Social Security number, which is your taxpayer identification number, is printed on your Social Security Card. If you do not have a Social Security Card, you can apply for one by completing Form SS-5, Application for a Social Security Number Card. If you are changing your name (due to marriage, divorce, etc.) notify the [Social Security Administration \(SSA\)](#) so that you can obtain a new Social Security Card.

If available, bring the Social Security cards and dates of birth for each of your children and other dependents. We will use this information for the dependents you can claim on your tax return. If you had a baby during the year, the hospital may have provided Social Security applications forms for your child. You must have a valid Social Security number for every person included on the tax return to electronically file with the IRS.

2. Driver's License(s) – We will use your driver's license to verify your identity. Other forms of identification you can bring include: state-issued picture ID, military ID with picture, U.S. passport, Resident Alien ID with picture, city-issued picture ID, or county-issued picture ID.
3. Wage Statements – Form W-2. For employee income, you should receive a Form W-2, Wage and Tax Statement, in the mail from each employer you worked for during the year. Contact the employer if you do not receive your Form W-2; it should be sent to you by January 31 of the following year.
4. For Non-Employee Income – Form 1099 Misc., Form 1099 NEC. If you have received \$600 or more, a 1099 form will be issued to you by January 31 of the following year.
5. All Income Statements from Retirement Income Sources – 1099R. Please bring all retirement statement, social security statements and all other sources of income statements received during the year.
6. Notice 1444 for any Stimulus Check received during the year
7. Past Three Year's Federal and State Tax Returns. You may be able to qualify for some of the same tax deductions or tax write-offs that you received last year.



Certain information from the prior year's returns will be required in calculating the current-year tax return.

8. Interest and Dividend Income – If you have earned interest from any bank during the year, the bank will send you a Form 1099-INT, *Interest Income*, at the end of the year. Even if you do not receive a Form 1099-INT, you still need to report your interest. If you do not receive a Form 1099-INT, consider bringing in your year-end bank statement to your tax interview so you can determine the amount to report. If, during the year, you have dividend income from stocks or funds, you will be sent a Form 1099-DIV, *Dividends and Distributions*, from each company or institution. Bring these year-end forms to your tax interview so that we can use them to help calculate your gross income.
9. Unemployment Income – If you received state unemployment compensation insurance during the year, it should be included as income on your return. The government will issue you a 1099-G by January 31 of the following year.
10. Social Security Income – If you received Social Security payments during the year, some of these funds may be taxable income. Please provide your form SSA-1099, *Social Security Benefit Statement* (Sent by the Social Security office at the end of the year) so we can determine the amount of benefits that are taxable, if any.
11. Pension or Retirement Income – For, 1099-R *Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.* should be sent to you from the payer by January 31 of the following year.
12. Itemized Deductions if they exceed \$12,400 single or married filing separately, \$18,650 if filing head of household, and \$24,800 for married filing joint. There is an additional standard deduction of \$1,300 for taxpayers who are over age 65 or blind. This amount is increased to \$1,650 for taxpayers who are unmarried.
13. A listing of all qualified Charitable Contributions for which you have a valid receipt whether you are able to itemize or not.



14. If you are able to itemize, please provide the following:
 - a. Mortgage and Home Equity Loan Interest Paid – Form 1098
 - b. Real Estate Taxes Paid if not provided on Form 1098
 - c. Medical, Eye Care, and Dental Expenses
15. Brokerage Statements for Sales of Stocks and Bonds – Form 1099-B
16. Income from Partnerships, S Corporations, Trusts and Estates – Form K-1
17. Income and Expenses from Rental Properties – Please bring the mortgage statements form 1098 and a complete Income Statement for each property
18. Estimated Tax Payments Made – Copies of canceled checks and forms 1040-ES
19. Alimony Paid or Received – New rules were implemented for the treatment of alimony payments effective for divorce or separation agreements entered into after December 31, 2018. Under the new tax bill, the tax deduction for alimony payments was eliminated and the recipients no longer need to treat alimony received as taxable income.
20. Record of Purchase, Sale or Refinance of Residence or other Real Property. If you refinanced, purchased or sold real estate during the year, we will need a copy of the closing statement.
21. Lottery or Gambling Winnings – Form W2-G. This form shows the amount you won and the amount of taxes withheld if applicable. All Gambling winnings are taxable, regardless of whether or not you received a W2-G. Gambling loss (up to the amount of gambling winnings) can be deducted on your income tax return. You must be able to substantiate your losses with a written log that includes the date, location, type of gambling amount of wager, and your winnings and losses.
22. IRA Contributions – The current IRA Contribution Limit is \$6,000 to your Roth or Traditional IRA. If you are age 50 or older, you can contribute a maximum of \$7,000 to your Roth or Traditional IRA.
23. Student Loan Interest paid in the current tax year – Form 1098-E *Student Loan Interest Statement*



24. Child Care Expenses and Child Care Provider Information. If you have a qualifying child under age 13, a disabled child of any age, or a disabled spouse, and you pay someone to provide care for them, you may qualify for a tax credit of up to 35% of your qualifying expenses, up to a maximum dollar amount. You must provide the IRS with the care provider's name, address, and taxpayer identification number which can be a Social Security number or an employer identification number.

25. Tuition and Education Fees – Form 1098-T *Tuition Payments Statement*, or a copy of your college tuition bill. If you are a student, or if you have a dependent who is a student, you may be able to qualify for an education tax credit for college tuition. Qualified tuition expenses are fees paid for you, your spouse, or a dependent you claim an exemption to attend an eligible institution.

26. Foreign Financial Holdings – If you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account, exceeding certain thresholds, the Bank Secrecy Act may require you to report the account yearly to the Department of Treasury by electronically filing a Financial Crimes Enforcement Network (FinCEN) 114, Report of Foreign Bank and Financial Accounts (FBAR). Those required to report their foreign accounts should file the FBAR electronically using the BSA E-Filing System by April 15 of the following year. Taxpayers with specified foreign financial assets that exceed certain thresholds must report those assets to the IRS on Form 8938, *Statement of Specified Foreign Financial Assets*, which is filed with your income tax returns.