

Documents Needed for Tax Preparation – Individual Returns

- Income documents
 - Latest wage statement
 - W-2s
 - 1099 misc – commissions, small business income
 - SSA-1099 – Social Security
 - RRB-1099 – Railroad retirement
 - 1099R - Pension, retirement
 - 1099B – Sales of securities
 - 1099-Int/1099-OID – Interest
 - 1099-Div - Dividends
 - 1099G – unemployment, state tax refund
 - 1099C – Cancelled Debt
 - W2 G – Gambling/Lottery winnings
 - Alimony Received/Paid including ex-spouse SSN & **Date of Divorce**
 - Scholarships/fellowship
 - Prizes, awards, jury duty, other
 - Schedule K1
- Investment documents – sale or purchase
 - Real Estate closing statements
 - 5498 IRA/401K Contributions
 - Retirement plan contributions
 - Sale/purchase documents from any asset, including business
- Foreign assets holdings and income
- Virtual Currency holding and transactions
- Payments from the IRS -- Stimulus and Child Tax Credit (Notice 1444/Letter 6475/Letter 6419)
- Letters & Notices from IRS or State agencies
 - Identity protection PIN letter
- Expense documents
 - Medical & dental
 - Real estate and personal property taxes
 - Large items subject to sales tax – vehicle, boat, remodel, etc.
 - Local or state income taxes
 - Estimated federal taxes
 - 1098 – Mortgage/HELOC interest
 - Mortgage closing statement
 - Charitable contribution receipts
 - K – 12 educator expenses
 - 1098T – tuition & education expenses, books and other education fees
 - 1098E – Student loan interest
 - Casualty loss or theft
 - Adoption of a child costs
 - Gambling losses
- Dependent care provider information
- Health Care documents
 - 1095 – all types
 - HSA contribution and distribution
 - Long Term Care
- Life cycle changes – including but not limited to
 - Birth/Death/Divorce
 - Employment/Retirement/Relocation
 - Inheritance/Bankruptcy
 - Children aging out of credits/college/empty nest
- Correspondence
 - IRS Letters & Notices
 - State Letters & Notices
 - Licensure changes

New Clients:

- Driver's License
- Social Security Card/IP Pin Documents
- Dependent(s) social security card
- Dependent(s) date of birth
- Previous 2 years' tax returns
- Voided check for direct deposit of refund

Please upload all tax documents to your online portal or drop off or mail in your documents to the AvantiPRO office