

# Mid-America Tax & Accounting

Some of the things I will need to complete your income tax returns

Please wait until you have everything together, then send me it all at one time.

You can get your things to me by sending them to my Gmail email; Secure Upload Service; putting hard copy documents into my physical Secure Loc-box; or making an appointment to meet face-to-face.

- Fill out the Personal Tax Organizer (PTO) and Engagement Letter.
- Picture of the front of your driver's license (spouse too if you are married).
- Copy of your prior year Fed and State tax returns.
- Married recently: Your wife took your last name, **did she also change her name with Social Security (SSA)?** The IRS and SSA databases must match.
- COLLEGE: If you had kids in college, I need to know what grade they were in during last tax season (i.e. Freshman, sophomore etc.). I need their tuition **Form 1098-T**. There are potentially big credits there.
- Heath Care: If you had Employer Provided healthcare, then I do not need any forms. If you paid for your own, or if you had Market Place insurance, I need your **Form 1095's**.
- IRS Security Pin: This affects a very small percentage of clients. Those that had their identity stolen in the past are required to have an IRS issued Security PIN. You should have received an annual letter from the IRS with this #.
- Moved from another state to MO or IL during last year: I need to know the date you moved from the other state, and the date you arrived at your current state.
- Own a business: I need the General Depreciation Schedule form. This might or might not be included in your prior year's return?
- Investment trading accounts: Your tax packet that typically includes 1099-Int, -Div, and stock sold information.
- **Any envelop that says, "Important Tax Information Enclosed", and all your W-2's, 1099-Misc, 1099-NEC, 1099-R, 1099-SSA, 1099-Div, 1099-Int.**