



## CLIENT INFORMATION

- Copy of last year's tax return (only if new client)
- Social Security number and date of birth for each taxpayer & dependent
- Drivers License or Valid Federal ID
- Banking information if electing Direct Deposit of Refund

## DEPENDENT INFORMATION

**IMPORTANT: The IRS requires us to document your ability to claim dependents.  
Bring at least two:**

- School records, Report Card, School ID, Enrollment letter etc.
- Medical Card, Medical Bills with dependent's name on it.
- Social Security Card
- Dependent's Driver's license Passport If available
- Birth Certificate
- Dates of birth and social security numbers
- Childcare records (including the provider's tax ID number) if applicable
- **Custodial/Non-Custodial Parents** Court ordered Custody Agreement(may be required),
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to the non-custodial parent (if applicable)

## COMMON FORMS / INCOME / DEDUCTIONS

- W2s for wages
- 1099Rs for pensions and IRAs
- W2Gs for gambling/lottery winnings
- 1099 for Social Security (1099-SSA) 1099-RRB Railroad Benefits
- 1099s for interest or dividend income (1099-DIV, 1099-INT)
- 1099 for unemployment compensation (1099-G)
- Flexible Spending Account (FSA) statements (1099-SA)
- Amount of alimony paid or received
- Statements for all IRA accounts
- All stock & securities sales (purchase date & cost)
- Student Loan Interest 1098E
- Other College expenses paid including school name & address
- Statements of interest paid on college loans

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- Home sale information (date/sales price of home sold & home purchased)
- Child care expenses including name and federal ID number of provider
- Any early withdrawal penalties charged by banks
- Landlords name and rent paid during the year
- Record of any estimated taxes paid by you
- 1095A, 1095B, 1095C, 1099HC — proof of health insurance form
- 1098T If Taxpayer or dependents are attending College ( if dependent, form is mailed to dependent)
- Electric Vehicle Purchase Documents/Bill of Sale
- Energy Credit Certification Document

#### **ITEMIZED DEDUCTIONS:**

- Medical expenses that exceed 7.5% of adjusted gross income (including prescriptions, eye care, medical equipment, insulin, acupuncture, nursing home/hospital fees, chiropractic, medical, dental, LTC insurance)
- Real estate taxes
- Auto excise taxes
- Mortgage statements from all mortgage & equity loans including closing statements
- Charitable contributions (cash & non cash). Please total your cash contributions
- Casualty and theft losses
- Gambling losses to extent of winnings
- Educator expenses (amounts paid by teachers K-12)

#### **BUSINESS OWNERS AND RENTAL PROPERTIES:**

- 1099K Merchant Services (EBay, Paypal, Square, Credit Card Processing)
- Depreciable assets: Acquisition dates & depreciation schedule
- All income and expenses
- Business use of home (utilities, repairs, house insurance, real estate taxes, direct expenses regarding office improvements)
- Expense items include: advertising, auto mileage, legal/professional fees, office expenses, taxes/licenses, meals/entertainment, utilities, cell phone, seminars, computer/software/internet

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