

# Documents Needed

## Individual Tax Return Preparation



### 1. Personal Information:

- Name(s) as shown on Social Security card(s). Including dependents (kids) on your tax return.

### 2. Income Documentation:

- **W-2s:** Wage and Salary Information
- **1099 Forms:**
  - **1099-INT:** Interest and Dividend income earned on savings accounts.
  - **1099-DIV:** Dividends from stocks, mutual funds, and bonds, including purchase dates and costs.
  - **1099-MISC:** Miscellaneous income (e.g., Schedule C summary if you worked as a subcontractor.)
  - **1099-K:** Payment card and third-party network transactions.
  - **1099-R:** Pension and IRA distributions.
  - **1099-S:** Home sales, including escrow statement (also called a settlement statement) and all costs to improve and sell property.
- **K-1s:** Partnership and S Corporation income.

### 3. Property and Rental Income:

- Rental property income and expenses.

### 4. Itemized Deductions:

- **Medical Expenses:** If they exceed 7% of your total income.
- **Sales Tax:** If applicable for purchases like a car, boat or RV.
- **Real Estate Tax:** County tax and DMV fees.
- **Mortgage Interest:**
  - **1098:** Mortgage interest paid.
  - Principal home
  - Refinancing statements, including escrow and settlement statements.
- **Charitable Contributions:**
  - Cash and checks
  - Property and "stuff"

### 5. Childcare Information:

- Care provider's name, SSN, address, telephone and amount paid for each child.

### 6. Education:

- **1098-T:** Tuition payments

### 7. Estimated Tax Payments:

- Records of payments made on:
  - April 15<sup>th</sup>
  - June 15<sup>th</sup>
  - September 15<sup>th</sup>
  - December 31<sup>st</sup> or January 15<sup>th</sup>

### 8. Health Insurance:

- **1095-A:** Health Insurance Marketplace Statement, or **1095-B:** Health Coverage Form

### 9. Additional Documents:

- Privacy Policy and Engagement Letter
- Any other document you feel may be needed.

**\*Please Do Not Send Individual Receipts – Only The Forms Requested\***