

Documents Needed to Prepare Your Return

Personal Taxes

Personal and Dependent Information

- ☐ Personal Identification (Driver License/SS card)
- ☐ Dependents' SS card & birth certificates
- ☐ Income Information
- ☐ Wage statements (*Form W-2*)
- ☐ Business Income & Expenses (*Form 1099-MISC*)
- ☐ Business Vehicle Mileage
- ☐ Pension/Retirement Income (*Form 1099-R*)
- ☐ Unemployment Income (*Form 1099-G*)
- ☐ Social Security Income (*Form SSA-1099*)
- ☐ Commissions (*Form 1099*)
- ☐ Stock Sales (*Form 1099-B*)
- ☐ Interest & Dividend Income
(*Form 1099-Int/Div/OID*)
- ☐ Lottery or Gambling Winnings (*Form W2-G*)
- ☐ Cancelled Debt Information (*Form 1099-C*)
- ☐ Alimony Paid/Received
 - ☐ Ex-spouse SSN & divorce decree
- ☐ Rental Income & Expenses

Deductions

- ☐ Mortgage Interest (*Form 1098*)
- ☐ Real Estate & Personal Taxes
- ☐ Childcare Expenses
 - ☐ Federal ID No.
 - ☐ Itemized breakdown per child
- ☐ Medical & Dental Expenses
 - ☐ Mileage/Mileage Log
- ☐ Home Purchase Statement
 - ☐ HUD Agreement
 - ☐ Record of Purchase or Sale of Residence
- ☐ Casualty or Theft Loss Information
- ☐ IRA Contributions (*Form 5498*)
- ☐ Estimated Taxes or Foreign Taxes Paid
- ☐ Vehicle Purchasing Agreement – shows sales tax
- ☐ Educator Expenses
- ☐ Tuition & Education Fees (*Form 1098-T*)
- ☐ Student Loan Interest (*Form 1098-E*)

Miscellaneous Items

- ☐ Last year's federal tax return
- ☐ Last year's state tax return
- ☐ Health Insurance (*Form 1095-A*)

Business/Corporate Taxes

Business Income (Total Summary)

- ☐ Gross Receipts from Sales or Services
- ☐ Returns/Refunds
- ☐ Business Interest – Checking/Savings Accounts
(*Form 1099-Int* or Year-end Bank Stmt)
- ☐ Inventory Information (if applicable)
- ☐ Other Income
 - ☐ _____

Business Expenses (Total by category)

- ☐ Advertising
- ☐ Automobile Expenses
 - ☐ Gas, Repairs, etc.
 - ☐ Mileage/Miles Driven
- ☐ Insurance
 - ☐ Vehicle Insurance
 - ☐ Liability Insurance
 - ☐ Business Insurance
 - ☐ Workers' Compensation Insurance
- ☐ Travel Expenses (hotel, airfare, taxi, etc.)
- ☐ Parking & Tolls
- ☐ Meals
- ☐ Internet Service
- ☐ Legal Fees
- ☐ Office Supplies
- ☐ Rent Expense
- ☐ Other Expenses
 - ☐ _____
 - ☐ _____

Assets & Equipment

- ☐ Purchase cost and acquisition date
- ☐ Sales price and disposition date of assets sold

Interest Expense

- ☐ Mortgage Interest (on building property owned)
- ☐ Business Loan Interest
- ☐ Auto Loan Interest
- ☐ Business Equipment Loan Interest

Miscellaneous Items

- ☐ Last year's federal tax return
- ☐ Last year's state tax return

Please scan or bring all the applicable items to your tax appointment.
Photographs of these documents cannot be accepted. Thank you!