

## **Tax information/documents commonly needed to prepare tax returns**

- Amounts received from Federal Stimulus Check/Economic Impact Payment or provide us with IRS Notice 1444 if you have received it. This is **required** to prepare your tax return.
- Information on any transactions dealing with virtual currency
- Copy of driver's license for you and your spouse
- Any changed address or changed contact information.
- Social security number and date of birth for any new dependent
- W-2 forms for wages
- W2G form for gambling winnings
- 1099 forms for miscellaneous income
- Form SSA - 1099 for Social Security income
- Form 1099-SA if you have used any funds from your HSA
- Year-end statements from IRA's and mutual funds
- 1095-A form if you have health insurance through the Market Place
- K-1 forms from partnerships, corporations, and estates
- Rental or self-employment income and expense
- Purchase, trade, and sale information for any business assets
- Any other statements of income
- Records of estimated taxes paid
- Property tax statements
- 1098 forms for mortgage interest
- 1098E form for student loan interest
- Donations to charity (there is a new above the line deduction for cash donations up to \$300).
- Out of pocket medical expenses (if you itemize)
- 1098T form for amounts paid for higher education
- Childcare provider's name, address, SS number or EIN/TIN and amount paid
- Signed 8332 form if you are the noncustodial parent claiming a dependent