



## **WHAT DO I NEED TO BRING FOR YOUR TAX RETURN?**

If you are new clients please bring  
Prior tax returns Photo Identifications – Social Security Cards for Dependents

Please bring all forms which show payments received.

- Wages, Tips, Sub-Pay, Sick Pay: (Forms W-2)
- Business Income & Expenses
- Child Care - Baby Sitting: Name Address & Federal ID # of Provider AND Amt. Pd.
- Dividends Received: (Form 1099 DIV)
- Estates Trusts Partnerships S Corporations: (Schedule K-1 Form 1041 1065 1120S)
- Gambling Winnings & Lottery Winnings: (Form W-2G)
- Health Insurance Coverage (Form(s) 1095-A, 1095-B, 1095-C)
  - Medicare Card Insurance Card(s) or Exemption Certificates
  - Income information for all household Dependents
- Interest income (Form 1099 INT)
- IRA Contributions: (Form 5498)
- Mortgage Interest & Taxes Paid: (Form 1098)
- Pensions, Annuities, IRA Distributions: (Form 1099R)
- Prizes & Awards: (Form 1099 MISG)
- Rental Income Received & Expense Paid on rental Property
- Roth IRA Contributions: (Form 5498)
- Sales of Stock or Property: (Form 1099 B or 1099 S)
  - Please Bring Closing Statements for Both Purchase & Sale
- Social Security Payments: (Form 1099SSA)
- State Tax Refund: (Form 1099 G)
- Student Loan Interest: (Form 1098 E)
- Tuition & Fees Paid: (Form 1098 T)
- Unemployment Compensation: (Form 1099 G)
- Are you listed as a signer or (co)owner on account(S) in another country?
- Do you transfer fund out of the US during the current or preceding year?
- Do you own or manage assets in other countries?