

FORMS/DOCUMENTS FOR TAX PREPARATION

For New Clients: Bring the past two prior year tax returns and/or a flash drive copy if self-prepared. Bring documentation to support the below items.

Income items - Following are examples:

W-2	Wages
1099INT	Interest from banks and investment companies
1099DIV	Dividend from investments
1099MISC	Other-income, contractor, non-employee
1099C	Debt Cancellation
1099R	Retirement, pensions, IRA, etc.
1099SA	Distributions from HSA
5498-SA	HSA contributions
K-1	From investments
SSA1099	Social Security
RRB1099R	Railroad Retirement

Energy Credit-Any investment for energy savings, documentation

Proof of health insurance for all family members for the Affordable Care Act requirements. Could receive forms 1095-A, B or C depending on your insurance.

Education:

1098T	Client or child to record college expense
1098E	Student loan interest

Itemized Expenses - Following are examples:

1098	Mortgage Interest
Various	Medical expenses (ins, prescriptions, doctors, etc.) property taxes, Charitable contributions (must have receipt or cancelled check) Miscellaneous Deductions-tax prep, unreimbursed employee expenses, union dues, investment fees, and safe deposit box Non-cash donations (must have receipts); goodwill, purple heart, etc.

Business: Must have records of all income and expenses for the year. Rental properties, need rents received, expenses such as advertising, property tax, insurance, interest paid on mortgage, repairs, etc.

Residence/property

Bring settlement papers for any properties sold/bought during the year.