

Bottom Line Accounting
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Documents Typically Needed to Prepare a Tax Return. The following documents and information are good examples of what is generally needed to complete your tax return:

- 1) Copies of Social Security Card/Numbers for each taxpayer and/or dependent (if not already provided);
- 2) Copies of current and valid driver's license or State ID cards for the taxpayer and spouse (a tool to help combat fraud);
- 3) IRS IP PIN (a six-digit number assigned to eligible taxpayers related to fraud and identity theft), if applicable or requested by the taxpayer and/or spouse;
- 4) Form(s) W-2 (wages, etc.) Pay stubs do not always have complete, accurate, or final information. Therefore, the real thing is required and; additional, it is illegal to prepare your return from a pay stub per IRS regulations;
- 5) Copy of your last pay stub of the year;
- 6) Form(s) 1099 (interest, dividends, miscellaneous, nonemployee compensation etc.);
- 7) Schedule(s) K-1 (income/loss from partnerships, S Corps, etc.);
- 8) If you purchased your health insurance coverage through The Marketplace, you **MUST** have Form 1095-A to accurately complete your tax return. If you received Forms 1095-B or Forms 1095-C, please include those in your tax documents although they are no longer mandatory;
- 9) Form(s) 1098 (mortgage interest) and property tax statements for both houses and vehicles;
- 10) Copies of closing statements regarding the sale, purchase, or refinancing of real property;
- 11) Brokerage statements from stock, bond or other investment transactions, to include information regarding the original cost of stock and the date purchased for any stock sold during the year;
- 12) Legal paperwork for adoption, divorce, separation, and /or custody issues;
- 13) All other supporting documents (schedules, checkbooks, etc.) as necessary to document your tax information;
- 14) Written documentation for charitable gifts. (Receipts, cancelled checks, acknowledgment letters, etc.);
- 15) Any tax notices received from the IRS or other taxing authority; and
- 16) A copy of your 2023 tax return if it was not prepared in our office.