



Please gather the following information for your Tax Advising Team.

- Driver's License or State ID (if married provide spouses)
- Social Security numbers for yourself, spouse, and dependents
- Birth dates for yourself, spouse, and dependents
- Most Recent Tax Returns (2 years) *if we have NOT prepared your returns*
- Voided Check/Bank Information *if you want direct deposit or direct debit*
- Divorce decree - if applicable
- Signed 8332 for custodial parent - if applicable

- **Income:**
 - W2 if employed
 - 1099G if unemployed
 - 1099MISC if self-employed along with business financial statements, records of estimated tax payments, office in the home*, depreciation schedule, mileage logs, and description of vehicle(s)
*Office in the home: square footable of exclusive space used for business, square footage of entire home, all utilities costs, homeowners insurance, alarm system, repairs and maintenance
 - Stimulus Check? If so, how much and proof (letter from IRS-Letter 1444 or bank statement showing the deposit)

- **Unearned Income:**
 - 1099INT from banks and credit unions
 - 1099DIV and 1099B from brokerage firms
 - Alimony received
 - 1099R - IRA, Pension, and Annuity
 - 1099SSA - Social Security benefits
 - State Income Tax refund from previous year (if you are new to our firm)
 - Jury duty payments (if retained)
 - Gambling winnings (bring in supporting losses to offset)

- **Other Income:**
 - K1 - Form 1065, 1120S, 1041
 - Rental Income and detailed rental expenses including any new asset items (date of improvement/purchase and total cost) and depreciation schedule (if new to our firm)
 - 1099SA - distributions from HSA/MSA - if qualified list of medical expenses
 - Hobby income and expense

- **Deductions:**

- 1098INT - Mortgage and/or Home Equity Line of Credit on all properties
- Property tax bills and record of all payments on all properties owned
- Charitable donations - detailed list of cash/check. A second detailed list of clothing and household goods donated (ex: Goodwill) with dates of those contributions if over \$500.00
- Any state taxes paid for previous years
- Charitable miles driven
- Medical expenses - prescriptions, copays, hospital, nursing care, vision & dental
- Medical premiums (if NOT pre-tax through the employer)
- Medicare supplements paid out of pocket
- Medical miles driven
- Vehicle loan interest paid if used for business
- Alimony paid with recipient's full name and social security numbers
- Childcare Records - recipient's name, social security number or FEIN, and address and amount paid to the provider

- **Education Expenses:**

- 1098E - Student Loans
- 1098T - From educational institution with details of your payments
- Private School (K - 12) - School name, address, FEIN, and tuition paid
- 1099Q - Payments from Qualified Educational Programs (if applicable)

- **Deduction/Contributions:**

- Form 5498 - Self directed IRA's (ROTH or TRAD), SEP and SIMPLE IRA's
- Form 5498 - Self directed HSA Contributions
- EdVest or Tomorrow Scholar 529 - Educational plan contributions

- **Health Insurance:**

- Form 1095-A if you enrolled in an insurance plan through the Marketplace Exchange
- Form 1095-B and/or 1095-C if you had insurance coverage through any other source (e.g., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
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- **Provide year end statements which will be used to quality check reporting:**

- Banks and credit unions
- Brokerage accounts
- 401(k) 403(b), 457, or other Qualified Employer Plans - include current and previous employers, IRA's - ROTH and Traditional
- Annuities - fixed and variable
- Life Insurance statements with Cash Value (term policies not needed)