

Accounts Serve

Commonly used documents for tax preparation

Personal information

- Social Security numbers and dates of birth for you, your spouse, your dependents
- New clients may provide prior year's tax return for you and your spouse (Not mandatory)
- Bank account number and routing number, if depositing your refund directly into your account
- Clear readable copy of Driver license, state issued id or valid passport

Information about your income

- W-2 forms - you and your spouse
- 1099-MISC forms - you and your spouse (contract-based work)
- 1099-G forms - unemployment income, or state or local tax refunds
- SSA-1099 - Social Security benefits received
- 1099-R - payments from IRAs or retirement plans
- 1099-S forms - income from sale of a property
- 1099-INT, -DIV, -B, or K-1s - investment or interest income
- SSA-1099 - Social Security benefits received
- Alimony received
- Business or farming income - profit/loss statement, capital equipment information
- Rental property income and expenses: profit/loss statement, suspended loss information
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.

Adjustments to your income

- Form 1098-E - student loan interest paid (or loan statements for student loans)
- Records of IRA contributions made during the year
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records
- Moving expense - Provide receipts
- Alimony paid - provide spouse SSN

Deductions and Credits

- Child care costs - provider's name, address, tax ID, and amount paid
- Form 1098-T - education expenses
- Forms 1098 - Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment interest expenses
- Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated property; miles driven and out-of-pocket expenses
- Medical and dental expense records
- Casualty and theft losses: amount of damage, insurance reimbursements

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- Records/amounts of other miscellaneous tax deductions: union dues; unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.)
- Records of home business expenses, home size/office size (square feet), home expenses (indicate if direct expenses)
- 1095-B - Health Insurance proof

Taxes you paid in prior year

- State and local income taxes paid
- Real estate taxes paid
- Personal property taxes
- Vehicle license fees based on value of vehicle