



Commonly used documents for tax preparation

Personal information

- Drive license, state issued id or valid passport
- 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
- Bank account number and routing number, if electing for direct deposit for tax refund or direct debit for paying your tax liability
- Identity theft PIN issued by IRS (if applicable)

Information about your income

- W-2 forms - you and your spouse
 - Provide last paystub of the year to support Overtime and Tips
- 1099-MISC forms - you and your spouse (contract-based work)
 - If you received Tips, provide vendor payout detail reflecting Regular pay and Tips
- 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
- W-2 G - Gambling winnings
- 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, 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 – Monthly or Annual statement from your financial institution for the month or the year in which contributions were made.
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records

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



- 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)
- Business miles log (Business owners only)
- 1095-B - Health Insurance proof
- Closing disclosure (if purchased or refinanced property)

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