

# What Do I Need?

These are the common tax documents we will need from you. Review the checklist and provide any that apply to you. This will help us make sure your return is prepared timely and accurately. *This is not an exclusive list, thus we may ask for additional information.*

## Tax Preparation Checklist:

### General Information

- Social Security Numbers and birthdays for you, your spouse, and/or dependents
- Copies of last year's tax return ([New Clients](#))
- Bank account and routing number, for direct deposit and/or direct payment
- Foreign bank account information, if any

### Income

- W-2 forms
- 1099-C forms
- 1099-G forms
- 1099-MISC and/or 1099-NEC forms
- 1099-R, Form 8606
- 1099-S
- 1099-INT, -DIV, -B, or K-1s
- SSA-1099
- Alimony received
- Business or farming income - profit/loss statement, capital equipment information
- Rental property income and expenses: profit/loss statement, suspended loss information
- Prior year installment sale information - Forms 6252, principal and interest collected during the year, SSN and address for payer
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.

## Adjustments

- Form 1098-E
- Form 1098-T
- Teachers? Canceled checks or receipts for expenses paid for classroom supplies, etc.
- 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
- Records of moving expenses ([Military Only](#))
- Alimony paid
- Keogh, SEP, SIMPLE, and other self-employed pension plans

## Deductions and credits

- Child care expenses: Provider's name, address, tax ID or SSN, and amount paid
- Education expenses: Form 1098-T, education expenses
- Adoption expenses: SSN of child; records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- 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: ([Federally Declared Disaster Areas](#))
- Health Insurance through the Marketplace: Form 1095-A

## Paid taxes?

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