

## **ARE YOU PREPARED?**

### **Here's a checklist to help you prepare**

#### **PERSONAL INFORMATION**

- VALID GOVERNMENT-ISSUED PHOTO ID (DRIVER'S LICENSE, STATE ID, OR PASSPORT)
- SOCIAL SECURITY CARDS (FOR YOU, SPOUSE AND ALL DEPENDENTS CLAIMED)
- DATE OF BIRTH FOR YOU, SPOUSE AND ALL DEPENDENTS
- LAST YEAR'S TAX RETURN (IF AVAILABLE)
- PROOF OF ADDRESS (UTILITY BILL, LEASE AGREEMENT, ETC)

#### **INCOME DOCUMENTS**

- W-2 FORMS FROM ALL EMPLOYERS
- 1099 FORMS (1099-NEC, 1099-MISC, 1099-K, 1099-INT, 1099-DIV, etc)
- UNEMPLOYMENT INCOME (1099-G)
- SOCIAL SECURITY INCOME (SSA-1099)
- PENSION, IRA, OR RETIREMENT INCOME (1099-R)
- GAMBLING WINNINGS (W-2G)
- RENTAL INCOME RECORDS
- SELF-EMPLOYMENT INCOME (PROFIT AND LOSS STATEMENT, EXPENSE RECORDS)

#### **DEDUCTIONS AND CREDITS**

- CHILDCARE EXPENSES (PROVIDER'S NAME, ADDRESS, AND TAX ID)
- EDUCATION EXPENSES (1098-T FOR TUITION PAYMENTS, STUDENT LOAN INTEREST STATEMENTS)
- MORTGAGE INTEREST STATEMENT (1098)
- PROPERTY TAX BILLS
- CHARITABLE CONTRIBUTIONS (CASH AND NON-CASH DONATIONS)
- MEDICAL EXPENSES ( IF THEY EXCEED 7.5% OF YOUR INCOME)
- ENERGY-EFFICIENT HOME IMPROVEMENT RECEIPTS

**BANK INFORMATION**

- BANK ACCOUNT AND ROUTING NUMBER FOR DIRECT DEPOSIT
- VOID CHECK (OPTIONAL BUT HELPFUL)

**BUSINESS OWNERS & SELF-EMPLOYED INDIVIDUALS**

- PROFIT AND LOSS STATEMENT OR INCOME AND EXPENSE REPORT
- BUSINESS-USE ASSET RECEIPTS (FOR EQUIPMENT, FURNITURE, ETC.)
- MILEAGE LOG ( FOR BUSINESS VEHICLE USAGE
- HOME OFFICE EXPENSES (IF APPLICABLE, INCLUDE UTILITIES, INTERNET, RENT/ MORTGAGE
- BUSINESS LICENSES, PERMITS, AND PROFESSIONAL MEMBERSHIPS

**INVESTMENT INFORMATION**

- STATEMENTS FROM INVESTMENT ACCOUNTS (SHOEING CONTRIBUTIONS, DIVIDENDS, SALES)
- CRYPTOCURRENCY TRANSACTIONS ( RECORDS OF PURCHASES, SALES AND EXCHANGES)
- RETIREMENT ACCOUNT WITHDRAWALS (IRA, 401(K) , PENSION DISTRIBUTIONS)

**OTHER RELEVANT DOCUMENTS**

- LAST YEAR'S TAX RETURN ( IF YOU ARE A NEW CLIENT)
- BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT ( ROUTING AND ACCOUNT NUMBER)
- ESTIMATED TAX PAYMENTS RECEIPTS (IF APPLICABLE)
- FORMS 1095-A, B, OR C FOR HEALTH INSURANCE COVERAGE

***Let's make your tax process easy and smooth.***