

## Tax Check list

- Proof of identification (photo ID)
- Social Security cards for you, your spouse and dependents
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- Sales of Real Estate: Form 1099-S
- Alimony Received or Paid
- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099
- Birth dates for you, your spouse and dependents on the tax return
- Rental Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Business Income and Expenses (Tax ID if applicable)
- Tax Deductible Miles Traveled for Business Purposes
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc, 1099-NEC) from all employers
- Interest and dividend statements from banks (Forms 1099)
- Health Insurance form 1095-A if applicable
- Student Loan Interest Paid (1099-INT) and Tuition Paid (1098-T)
- IRA Contributions and HSA Contributions
- Proof of bank account routing and account numbers for direct deposit such as a blank check
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number as well as their address
- Unemployment Compensation Received (UIA 1099-G) Form
- Federal and State Estimates made – if applicable

*\*new clients, please upload your taxes from the previous year please\**

For addition questions and information please refer to: <https://www.irs.gov/individuals>