



It is our commitment to ensure you meet your tax obligations and save as much money as possible. Please view the checklist below to prepare for your appointment.

### Tax Prep Checklist for Individuals

- Your Social Security Number or Federal Tax ID number
- Your Spouse's Full Name and Social Security Number/ Federal Tax ID number
- New Clients (Your previous year Tax Return)
- Current Mailing Address and Occupation Title

### Dependents

- Children(s) Full Name as shown on Social Security Card
- Children(s) Social Security numbers and Date(s) of birth
- Child care records with mailing address and Tax Payers ID
- Other Applicable adults: Please provide their income

### Employee Income Information

- W-2

### Self-Employment Documents (where applicable)

- 1099-MISC
- Business Assets
- Business Miles Driven for work (yearly), Parking, Tolls and applicable vehicle expense
- Any other expenses associated with Home Office
- Report of all Expenses (Bank statements, credit card statements, check stubs)

### Education Information (where applicable)

- 1098-T from colleges (note: Law changes that only "Amounts Paid" is credited not "Amount Billed")
- Any Educational expenses
- 1098-E for student loan interest paid



## Rental Property Information (where applicable)

- Income
- Expenses (Maintenance, Repairs, Decors, Utilities, etc.)
- Property Assets (Hud/ Closing statements)

## Retirement, Health Contributions and Contributions to Retirement Plans

- Retirement Income
- 5498-SA HSA contributions
- Pension/ IRA (Form 5498)/ Annuity 1099-R
- Social Security/ RRB Income 1099-SSA/RRB-1099

## Investments and Savings

- Interest and dividend income (1099-INT, 1099-OID, 1099-DIV)
- Stock sales and buys(1099-B, 1099-S, 1099-B)

## Other Income (where applicable)

- Unemployment, State Refunds (1099-G)
- Gambling Income
- Alimony received
- HSA and long term care (1099-SA, 1099-LTC)
- Jury Duty document of pay
- Other 1099

## Affordable Care Act

- 1095-A ( This form is from the Marketplace Exchange)
- 1095-B and 1095-C (If you had insurance through any other source)
- Market Place exemption certificate (ECN)



## Other Credits and Deductions

- Moving expense records (not reimbursed)
- 1098 Mortgage interest statements
- If Refinanced, Sold or Purchased a home provided Closing Statement/ HUD1
- State or Local Taxes Paid (Vehicle Property Taxes, Real estate Property taxes)
- Cash/ Checks donations to Church, Schools and other credited charitable organizations
- Documents of non-cash donations and charity
- Healthcare medical expenses, doctors, co-pays, dentist, prescriptions, miles driven
- Employment related expenses (dues, uniforms, cleaning, traveling, tools, telephone)
- Job hunting expenses
- Energy Saving home improvements
- Estimated tax payments