

## **Tax Preparation for Personal Information**

Social Security numbers for any new dependents

## **Tax Preparation for Income Information**

W-2 Forms from all employers

1099 Forms if you (or your spouse) completed contract work

1099R Forms from IRA, Pensions or 401K and Annuities

K-1 Forms from Partnership, S-Corporations or Investments

Date and amount of any estimated payments made during the year and entity to whom they were paid

Investment income information 1099INT, 1099DIV and 1099B (including: interest income, dividend income, proceeds from the sale of bonds or stocks, and income from foreign investments)

Income from local and state tax refunds from the prior year.

Business income (accounting records for any business that you own)

Unemployment income

Rental property income – *each property should be kept separate*

Social Security benefits

Miscellaneous income (including: jury duty, lottery and gambling winnings, Form 1099-MISC for prizes and awards, and Form 1099-MSA for distributions from medical savings accounts)

***Amount received from the 3<sup>d</sup> stimulus payment (Mid-March 2021)***

***Amount of Child Tax Credits received (15<sup>th</sup> of each month starting July 2021)***

## **Tax Preparation for Income Adjustments**

IRA contributions *including Roth and SEP*

Student loan interest paid

Medical Savings Account (MSA) contributions

Self-employed health insurance

1095 Form - proof of health insurance

## **Tax Preparation for Credits and Deductions**

Mortgage interest on home acquisition debt

HE Loan/LOC interest on home acquisition debt or used to improve home

Real Estate Taxes

Education costs

Childcare costs- *must have name of caregiver, address and Employer Identification Number*

Adoption costs

Charitable contributions/donations – *separate monetary and non-monetary*

Breakdown of farming, rental or business expenses – *separate expenses by category*

Medical expenses

## **If having your refund direct deposited**

Your bank account number

The bank's routing number