

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 and earned more than \$600.

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

K-1 Forms from Partnerships or S-Corporations

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

Investment income information (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)

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

Moving expenses

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