

Tax Preparation for Personal Information

New clients – copy of last year's tax return
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)
Records of any transactions involving cryptocurrency
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

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
Medical expenses
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*

If having your refund direct deposited

Your bank account number and the bank's routing number