What Information/Forms are Needed to Complete Your Tax Return

- [ ] Current Drivers License for Taxpayer & Spouse
- [ ] Last Pay stub of the Year
- [ ] Proof of Medical Insurance (Form 1095A, B and/or C)
- [ ] *New Client Only* Social Security Cards for Taxpayer, Spouse and all Dependents
- [ ] *New Client Only* Copy of the three (3) previous years tax returns
- [ ] **Any Document that says 'Important Tax Information'**
- [ ] Wage Statement (Form W-2)
- [ ] Social Security Statements (Form 1099SA)
- [ ] Pension, IRA & other Retirement Statements (Form 1099R)
- [ ] Interest Income Statement from Banks/Credit Unions & Brokerages (Form 1099INT)
- [ ] Dividend Statement from Banks/Credit Unions & Brokerages (Form 1099DIV)
- [ ] Stocks & Bond Statements (Form 1099B)
- [ ] Unemployment & State Refund Statements (Form 1099G)
- [ ] 1099MISC Statements for Rents, Royalties, Independent Contractors, Other
- [ ] Mortgage Interest Paid (Form 1098)
- [ ] Property Tax Paid Statements (on Form 1098 sometimes)
- [ ] Charitable Donations Statements
- [ ] Non cash Charitable Donations Statements which include this information: Name & address of charity; EIN(tax id #) of charity; description of items contributed; value of items contributed (see donation value guide on my website)
- [ ] Student Loan Interest (Form 1098E)
- [ ] Education Tuition and Expenses to include Form 1098T
- [ ] HSA Statements Forms 1099SA & 5498SA
- [ ] K-1 from any partnership or corporation or trust involved with
- [ ] **Any other form or information you think is related to your taxes**