



What to bring to my tax preparer

Everyone needs to provide:

- ❖ Driver's license or State ID
- ❖ Date of birth
- ❖ Social Security Number

Have dependents? We need from you:

- ❖ Dependent's name
- ❖ Dependent's date of birth
- ❖ Dependent's social security number
- ❖ Worksheet filled out

New Clients?

⇒ We need your last year's tax return. Don't worry, you will get it all back!

This is a comprehensive list of items that could be used and most likely won't all apply to you.

- | | |
|--|---|
| <input type="checkbox"/> Social security card for new dependent | <input type="checkbox"/> IRA/401K Contributions and distributions |
| <input type="checkbox"/> W-2's for employment | <input type="checkbox"/> educator expenses |
| <input type="checkbox"/> W-2G for gambling winnings (incl losses) | <input type="checkbox"/> 1098 T for tuition and education fees |
| <input type="checkbox"/> 1099 R for retirement, annuities, pensions, or IRA's | <input type="checkbox"/> 1098 E for student loan interest paid |
| <input type="checkbox"/> 1099 NEC for work as independent contractor (incl expenses) | <input type="checkbox"/> casualty/theft losses |
| <input type="checkbox"/> 1099 G for unemployment or state income tax refund | <input type="checkbox"/> estimated taxes paid |
| <input type="checkbox"/> 1099 B for sales of stocks | <input type="checkbox"/> foreign/other taxes paid |
| <input type="checkbox"/> 1099 C for cancellation of debt | <input type="checkbox"/> state and local tax payments |
| <input type="checkbox"/> 1099 DIV for dividends | <input type="checkbox"/> investment interest paid |
| <input type="checkbox"/> 1099 INT for interest | <input type="checkbox"/> any forms for cryptocurrency |
| <input type="checkbox"/> 1099 MISC for miscellaneous income | |
| <input type="checkbox"/> SSA for social security statement | |
| <input type="checkbox"/> self employed income and expenses | |
| <input type="checkbox"/> income and expenses for self employed businesses | |
| <input type="checkbox"/> income and expenses for rentals | |
| <input type="checkbox"/> income and expenses for farms | |
| <input type="checkbox"/> childcare expenses and provider information | |
| <input type="checkbox"/> alimony paid or received (incl name and SSN of person you paid) | |
| <input type="checkbox"/> medical, eye care, and dental expenses (incl mileage to and from) | |
| <input type="checkbox"/> cash and non cash charitable donations. SAVE RECEIPTS | |
| <input type="checkbox"/> record of purchase or sale of real residence | |
| <input type="checkbox"/> 1098 mortgage or home equity loan interest paid | |
| <input type="checkbox"/> real estate and personal property taxes paid | |

Anything dealing with receipts---
Please provide us with the totals only.
Keep your receipts at home for 5 years in
case of an audit.