

What to Bring to Prepare Your Taxes Individual Taxpayers

New clients need to bring a copy of the last tax return filed

Social Security numbers for taxpayer, spouse, and dependents (new clients)

Birthdates for taxpayer, spouse, and dependents (new clients)

W2s

Record of other income (1099s):

- Interest and dividend income
- Non-employee compensation
- Prizes and awards

Purchase and sale statements from stocks, bonds, and mutual funds

- And** your cost for the items sold

State refund statements

Rental income, expenses, mortgage interest, real estate taxes paid, and HOA dues

- Purchase paperwork
- Re-finance paperwork
- List of improvements
- List of assets purchased with dates of purchase and amounts

K1s from Sub S Corporations, Partnerships, Estates, and Trusts

1099Rs for pension income and distributions

IRA and Retirement contribution amounts and type of IRA

Moving expenses

Itemized Deductions:

- Medical expenses
- Real estate taxes paid
- Auto registrations
- Re-finance paperwork
- Check and cash charitable contributions
- Investment and margin loan interest
- Casualty losses
- Safety deposit box fee
- Job related dues and subscriptions
- Job related insurance and union dues
- Employee business expenses
 - Total mileage on vehicle
 - Amount of mileage that was business
 - Supplies and tools
 - Job related educational expenses and books
 - Safety shoes and equipment
 - Cost of uniforms and uniform cleaning
- Health insurance premiums
- State income taxes paid
- Mortgage interest paid
- Home purchase paperwork
- Non-cash charitable contributions
- Timeshare statement
- Tax preparation fee
- Financial publication

Child care expenses: -Amounts and the name, address, and federal tax ID of provider

Copies of your most recent IRA, retirement, and investment statements

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