



This is a comprehensive list for your reference to help you prepare for your scheduled appointment. Not all information may apply.

Personal Data

Social Security Numbers (including spouse and children)
Child care provider: Name, address and tax I.D. or Social Security Number
Copy of Drivers License[s]

Employment & Income Data

W-2 forms
Unemployment compensation: Forms 1099-G
Miscellaneous income Forms 1099-MISC/NEC
Partnership, S Corporation, & trust income: Schedules K-1
Pensions and annuities: Forms 1099-R
Social Security/RRR benefits: Forms RRB-1099
Jury duty pay
Gambling and lottery winnings and reported losses
Prizes and awards
Scholarships and fellowships
State and local income tax refunds: Form 1099-G

Homeowner/Renter Data

Residential address(es) for this year
Mortgage interest: Form 1098
Sale of your home or other real estate: Form 1099-S
Second mortgage interest paid
Real estate taxes paid
Rent paid during tax year – (Must include Landlord's Name and address)

Financial Assets

Interest income statements: Form 1099-INT & 1099-OID
Dividend income statements: Form 1099-DIV
Proceeds from broker transactions: End of Year Consolidated Statement with Form 1099-B – (Please assure you have any original stock basis included from year of

acquisition)

Retirement plan distribution: Form 1099-R

Financial Liabilities

Auto Mileage record (Vehicle year and make) for vehicles used for business and be sure to include total mileage driven on that vehicle for the entire year

Student loan interest paid

Early withdrawal penalties on CDs and other time deposits

Automobiles

Personal property tax (Excise Tax) information – Information found on your registration

Expenses

Gifts to charity (qualified written statement from charity for any single donations of \$250 or more)

Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)

Investment expenses/Broker Fees

Job-hunting expenses

Job-related education expenses

Child care expenses

Medical Savings Accounts/Health Savings Accounts – Form 1099-SA

Self-employment Data

Business income: Forms 1099-MISC/NEC and/or own records – Also 1099-K Merchant Sales Tax reports

Partnership SE income: Schedules K-1

Business-related expenses: Receipts, other documents & own records – **these expenses MUST be listed, totaled and itemized; not grouped together**

Farm-related expenses: Receipts, other documents & own records

Employment taxes & other business taxes paid for current year: Payment records

Miscellaneous Tax Documents

Federal, state & local estimated income tax paid for current year: Estimated tax vouchers, canceled checks & other payment records

IRA, Keogh and other retirement plan contributions: If self-employed, identify as for self or employees

Records to document medical expenses

Records to document casualty or theft losses

Records for any other expenditures that may be deductible

Records for any other revenue or sales of property that may be taxable or reportable