

Items Needed for Personal Tax Preparation

1. All income Documents-W-2, 1099’s, S.S. income, interest statements, investments.
2. Dependents: Names, SS #’s and birthdates and any deductible child care expenses. Proof of residency for dependents qualifying for Earned Income Credit. -must have
3. Mortgage interest paid and real estate taxes (annual mortgage statement).
4. If new client, copy of previous year taxes.
5. Business Owners/Self employed-record of income and expenses.
6. If purchased a home in current tax year-settlement sheet (HUD-1) from purchase.
7. Unreimbursed business expenses, mileage for W-2 employees.
8. 1098-T statements from university for any qualifying education credits (must have).
9. Bank direct deposit information for any refund-bank name, routing number and account number. (voided check is preferred)
10. Copy of driver’s license or State ID. (Part of identity theft initiative.)
11. Charitable donations
12. Medical expenses in excess of 7.5% of AGI. 10% starting in 2019.
13. Any other documents you have received marked “important tax document”.