

## TAX DOCS NEEDED TO PREPARE YOUR RETURNS

CLIENT NAME: \_\_\_\_\_

*Please watch your mailbox for your tax docs end of Jan thru Feb. Those with investment accounts may receive docs up thru March. We do not have access to look up tax docs and anything missing we are not aware so be on the lookout for your tax docs.*

- W-2(s) \_\_\_\_\_ SELF \_\_\_\_\_ SPOUSE
- Unemployment (FORM 1099G) if applicable
- Interest Income, Dividend Income, Reports from stock accounts
- Mortgage interest/property tax statements (FORM 1098)
- 1099's - (R-retirement cashout/distributions, INT-interest income, DIV-dividends, MISC-miscellaneous, G-government/unemployment, SSA-social security statement, B-stock sales (need cost basis))
- HSA - Health savings accounts – if you took a distribution for medical, need your 1099SA
- K1's - from S Corporations, Partnerships, Trusts & Estates
- W-2G - gambling income
- Additional dependents (if new from previous year)
  - Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_
  - Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_
  - Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_
- College Tuition (FORM 1098-T), if using 529 plan need form 1099Q, books & supplies total
- Childcare information – (daycare statement if you have)
  - Name of Caregiver \_\_\_\_\_ SSN/EIN \_\_\_\_\_
  - Address \_\_\_\_\_ Total paid \_\_\_\_\_
- Marketplace insurance/Obamacare (FORM 1095-A)

### **ADDITIONAL IF APPLICABLE:**

- Donation receipts
- Medical insurance paid (out of pocket), if you used HSA to pay do not include amounts paid with HSA
- Medical bills, prescriptions -TOTAL AMOUNT will need to exceed 10% of income
- Long Term Care Insurance
- Medical Miles, if medical exceeds 10% of income
- License Plate Fees (can be found on your vehicle registration)
- Traditional IRA contributions
- ROTH IRA contributions

