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Common Tax Documents

The following list will help in collecting tax documents to provide to our office. If you are uncertain whether or not an item is includable in income or can be taken as a deduction, we recommend that you upload that documentation to your portal account. Let us, as the experts, make the determination as to its tax effect. That way we can get you every possible tax benefit to which you're entitled!

NEW CLIENTS

- Copy of prior year tax return(s) - in some cases we require multiple years of prior tax returns
- Social Security Cards for all who will be listed on the return
- Government issued photo ID (e.g., your driver's license)

NEW and RETURNING CLIENTS

- Income
 - Any IRS or State Notices or Letters
 - Form W-2(s) Wage statement (one per employer)
 - Schedule K-1(s) showing business/trust income and deductions
 - Form 1099-S or other supporting documentation for sale home or rental property
 - Record of estimated tax payments made (Form 1040ES)
- Self-Employed - Sole Proprietor or Single-member LLC (see "Deductible Business Expenses" document on our website for more information)
 - Forms 1099-NEC and 1099-K
 - Income records to verify amounts not reported on 1099s
 - Records of all expenses by category
 - Business-use asset information for all assets costing >\$2500 (cost, date placed in service, etc.) for depreciation
 - Home office information, if applicable
- Rental Income
 - Rental income/deductions support, including 1099-MISC (if applicable)
 - Rental asset information for all assets costing >\$2500 (cost, date placed in service, etc.) for depreciation
- Retirement Income
 - Pension/IRA/annuity income (1099-R)
 - Traditional IRA basis (prior-year Forms 8606 showing amounts already taxed)
 - Social Security/RRB income (SSA-1099, RRB-1099)
- Savings & Investments or Dividends
 - Interest, dividend income (1099-INT, 1099-OID, 1099-DIV) Note: These forms are sometimes included with Form 1099-B
 - Income from sales of stock or other property (1099-B, 1099-S)
 - Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

- Expenses related to your investments
- 1099-B and/or 1099-DIV from cryptocurrencies, NFTs and all other similar type income or loss
- Cost of all cryptocurrencies, NFTs and other similar type of income sales
- Other Income & Losses
 - Form W-2G Gambling income (records showing offsetting losses)
 - Form 1099-G Unemployment earnings or State refunds
 - Jury duty records
 - Hobby income and expenses
 - Prizes and awards
 - Royalties (1099-MISC)
 - Any other 1099s received
 - 1099-SA and/or 1099-LTC for HSA and/or long-term care reimbursements
- Home Ownership
 - Form 1098 or other mortgage interest statements
 - Real estate and personal property tax records (often included on Form 1098)
- Charitable Donations
 - Cash amounts donated to religious organizations, schools, other charitable groups
 - Records of non-cash charitable donations
 - Amounts of miles driven for charitable purposes
- Medical Expenses
 - Amounts paid to doctors, dentists, hospitals
 - Health insurance paid out-of-pocket (not through an employer plan or Medicare)
 - Miles driven for medical purposes and expenses including hotels, planes, tolls, parking
- Health Insurance
 - Form 1095-A if you have health insurance through a State Marketplace (Exchange)
- Childcare Expenses
 - Daycare paid for a child under age 13 so the taxpayer (and spouse) can work
 - Wages paid to a babysitter
- Educational Expenses
 - Forms 1098-T from educational institutions
 - Receipts for qualified educational expenses
 - Records of scholarships or fellowships
 - Form 1098-E for student loan interest
- State & Local Taxes or Sales Tax
 - Amount of state/local income tax (other than withholding), or of state/local sales tax
 - Invoice for large item purchases such as cars, boats, motorcycles etc.
 - Amount of real estate taxes paid
 - Amount of personal property taxes paid (e.g., auto registration fees)
- Retirement & Other Savings
 - Form 5498-SA showing HSA contributions
 - Form 5498 showing IRA contributions
 - All other 5498 series forms (5498-QA, 5498-ESA)
- Federally Declared Disaster
 - City/county you lived/worked/had property in
 - Records to support property losses (appraisal, clean-up costs, etc.)
 - Records of rebuilding/repair costs
 - Insurance reimbursements/claims to be paid
 - FEMA assistance information