



What to bring to your tax preparation appointment

***New Client Information sheet** ~ if you are a new client or have information to update.

Personal Data

- Social security numbers (for yourself, your spouse and your dependents)
- Birthdays (for yourself, your spouse and your dependents)
- Child care provider: name, address, tax ID number or social security number
- Alimony paid: social security number
- Payscale from last day of tax year (12/31)
- **For new clients, previous year's tax return**
- **Your checkbook for direct deposit information and payment**

Employment and income data

- W-2 forms for this tax year
- Unemployment compensation (Form 1099-G)
- Miscellaneous income including rent (Form 1099-Misc)
- Partnership, S Corporation & trust income (Schedule K-1)
- Pensions and annuities (Form 1099-R)
- Social security and RR1 benefits (Form RRB-1099 or SSA-1099)
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refunds (Form 1099-G)
- Health Savings Account Forms (for Microsoft Employees this is UMB)
- Health Insurance Coverage – Forms 1095-A, 1095-B, 1095-C



Homeowner and Renter Data

- Residential addresses for this year
- Mortgage interest (Form 1098)
- Sale of your home or other real estate (Form 1099-S)
- First two (2) pages of HUD1 for home purchased in tax year
- Second mortgage interest paid
- Real estate taxes paid
- Moving expenses, please ask for our *Moving Expenses Worksheet*
- If you own a rental property, please ask for our *Rental Property Worksheet*

Financial assets

- Auto loans and leases *if used for business* (account numbers and car value)
- Student loan interest paid
- Early withdrawal penalties on CDs and other time deposits
- Personal property tax information
- Sales receipts for new purchases
- If you have foreign accounts, please ask for our *Foreign Account Reporting Worksheet*

Expenses

- Gifts to charity (qualified written statement from charity for any single donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, uniforms, union dues, subscriptions)
- Investment expenses
- Job hunting expenses
- Job related education expenses
- Child care expenses
- Medical savings accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees



Self-employment Data

- Business income (Form 1099-MISC and/ or own records)
- Partnership SE income (Schedule K-1)
- Business related expenses (receipts, other documents and own records)
- Farm related expenses (receipts, other documents and own records)
- Employment taxes and other business taxes paid for current year (payment records)

Miscellaneous Tax Documents

- Federal, state, and local estimated income tax paid for current year (estimated tax vouchers, cancelled checks and 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 for any other expenditures that may be deductible
- Records for any other revenue or sales of property that may be taxable or reportable