What kind of information do you need for my tax return?

In order for us to prepare your annual tax returns, we will need your assistant in gathering your tax documents as well as information to aide in the process. Please note that this is not an all inclusive list, nor do we expect for anyone to have all of the listed below, but are merely offering a list of suggested common items:

- Personal Information:
  - Social Security Number or Tax ID Number and Date of birth for each member of your family
  - Routing and account number for the bank account you will receive refunds or withdrawal tax payments from
  - Identity Protection Pins (If Applicable)
- Dependent Information:
  - Childcare records (including tax identification number of the provider(s))
  - Income of dependents and other adults in the home
  - Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)
- Sources of Income (not all will apply):
  - Forms W-2
  - Unemployment (1099-G)
  - Self-Employed:
    - Forms 1099, Schedule K-1, Income records to verify amounts not reported on 1099s
    - Records of all expenses
    - Business use asset information (cost, date placed in service, etc)
    - Office in home information, if applicable
    - Record of estimated tax payments
  - Rental Income:
    - Records of income and expenses
    - Rental asset information
    - Record of estimated tax payments
  - Retirement Income:
    - Pension/IRA/Annuity income (1099-R)
    - Traditional IRA Basis (amounts you contributed to the IRA that were already taxed)
    - Social Security/RRB Income (SSA-1099, RRB-1099)
  - Savings & Investments or Dividends
    - Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
    - 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)
    - Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

        - Expenses related to your investments Record of estimated tax payments made (Form 1040-ES)
        - Transactions involving cryptocurrency (Virtual currency)
    - Other Income & Losses
        - Payment Card and Third Party Network Transactions (1099-K)
        - Gambling income (W-2G or records showing income, as well as expense records)
        - Jury duty records
        - Hobby income and expenses
        - Prizes and awards
        - Trust income
        - Royalty Income 1099-MISC
        - Any other 1099s received
        - Record of Alimony paid/received with ex-spouses name and SSN
        - State tax refund
- Types of Deductions: The types of deductions you can take depend a lot on your life situation. It's likely you won't need all of the documents listed below for your taxes:
    - Home and Vehicle Ownership
        - Form 1098 or other mortgage interest statements
        - Real estate and personal property tax records
        - Receipts for energy-saving home improvements (e.g. solar panels, solar water heater)
        - Electric vehicle information
        - All other 1098 series forms
    - Charitable Donations
        - Cash amounts donated to houses of worship, schools, or other charitable organizations
        - Records of non-cash charitable donations
        - Amounts of miles driven for charitable and medical purposes
    - Medical Expenses
        - Amounts paid for healthcare, prescriptions, and to doctors, dentists, and hospitals
        - Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan (pre-taxed)
    - Health Insurance
        - Form 1095-A if you enrolled in an insurance plan through the marketplace (Exchange)
    - Childcare Expenses
        - Fees paid to a licensed daycare provider or family day care for childcare.
        - Amounts paid to a baby-sitter or provider care of your child under age while you work.
        - Expenses paid through a dependent care flexible spending account at work.
    - Educational Expenses
        - Form 1098-T from educational institutions
        - Receipts that itemize qualified educational expenses

    - Records of any scholarships or fellowships you or family members have received
    - Form 1098-E if you paid student loan interest
- K-12 Educator Expenses
    - Receipts for classroom expenses (for educators in grades K-12)
- State and Local Taxes
    - Amount of state and local income or sales tax paid (other than wage withholding)
    - Invoice showing amount of Vehicle sales tax paid and /or personal property tax on vehicles
- 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
    - Check the FEMA website to see if your county has been declared a federal disaster area