



399 South Broadway Street * Lake Orion, MI 48362
Ph (248) 693-0003 * Fax (248) 693-5074

DOCUMENTS NEEDED PRIOR TO YOUR TAX PREPARATION

Please include this form with your completed documents

- **Income:**

- W-2
- 1099-R and/or Social Security Statement
- 1099-INT, 1099-DIV, 1099-B, Financial Brokerage statements (Merrill Lynch, Edward Jones)
- Other 1099 Forms such as: 1099-MISC, 1099-C, 1099-K

- **Other income such as:**

- Form K-1
- Gambling or hobby income
- Credit card debt forgiveness
- Other

- **Forms pertaining to deductions:**

- Mortgage Interest statement(s)
- Property tax statement(s)
- Cash contributions
- Non-cash contributions (Goodwill, Salvation Army). Please assign values to your non-cash items.
- Cost of license plate tabs
- Medical expenses

- **Dependents:**

- Child care expenses.
- If there are any new dependents: name, birthdate and social security number is needed.
- Form 1099-Q (Education Programs) and substantiation of amounts received.
- College tuition Form 1098-T
- Other college expenses

- **Health insurance information:**

- Form 1095-A, 1095-B or 1095-C
- Form 1099-SA, 5498-SA or 1099-QA

- If you are recently divorced, please bring a copy of your divorce papers.
- If you purchased a new home or re-financed your mortgage, please bring the closing documents.
- If you started a business, we will need additional set-up time and all income and expenses relating to the business.
- If you purchased rental property we will need additional set up time. All documents relating to the purchase of the property/home, income and expenses relating to the rental property.
- And most importantly, please give some thought before our meeting as to some of your financial goals, objectives and questions that you have.
- **Please include this form with your documents.**