What to bring to your tax appointment…

This is a list of the most common items we will need to prepare you tax returns. We may still ask questions to clarify some items and some additional information may still be needed.

All W-2 forms

Affordable Care Act Forms 1095-A

All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings and others.

Form 1444 showing stimulus payment #3.

All income information for your children. If you have prepared their return, bring it too.

Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid.

Total of all receipted charitable contributions, and details for any non-cash contributions over $500.

Copies of all LLC, Partnership or S-Corporation K-1 form. If you have not received them, please advise us if they are not available at this time.

If you bought, sold or refinanced real estate, a closing statement for each transaction is needed.

If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale (year-end summary statements are ideal).

If you are claiming auto mileage as a deduction for business or rental properties.
We need to know: total miles, commuting miles, and business miles driven for the year.

Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.

All legal documents for formation, sale or purchase of a business, rental or personal home during the year.

All legal documents for divorce decrees.

Banking information for direct deposit of refunds.

New clients: Copies of prior federal or state returns and depreciation schedules if applicable, at least one year).