**Common Documents/Information Needed for**

**Individual Tax Return Preparation**

**Personal/General**

1. Questionnaire/Organizer
2. Signed Engagement Letter
3. Prior Year’s Tax Returns (if new client)
4. Bank Info (Voided Check/Bank Letter if refund to be direct deposited and we don’t have it from previous years)
5. Driver’s License for taxpayer and spouse (if new client or DL renewed since last year)
6. Social Security card for taxpayer, spouse and all dependents (if new client or new dependent)
7. Health Insurance 1095 A/B/C
8. IP PIN (if issued by IRS)

**Income**

1. Wages and/or Unemployment (W-2/W-2G)
2. Interest and Dividends (1099-DIV/1099-INT)
3. Social Security (1099-SSA)
4. Pension/Annuity (1099-R)
5. Payment cards, apps and online marketplace income (1099-K)
6. Stock/Bond Capital Gains Brokerage statements (1099-B)
7. Contract/Partnership/Trust/Estate Income (K-1)
8. Gambling/Lottery Winnings/Prizes/Bonuses
9. Alimony Income (if agreement signed or modified prior to 2019)
10. Rental Income
11. Self-Employment Income
12. Tip Income
13. Roth Conversion
14. Foreign Income

**Expenses**

1. Mortgage Interest on primary/secondary residence (1098)
2. Real Estate and Personal Property Taxes
3. Charitable Contributions (Cash and Non-Cash)
4. Medical Expenses not covered by health insurance (after-tax premium payments, deductibles, co-pays, long term care insurance and expenses, etc.)
5. Gambling/Lottery expenses
6. Estimated tax payments to federal and state and dates paid
7. Other expenses/deductions

**Credits/Adjustments**

1. HSA contributions and distributions (1099-SA)
2. Education/Tuition, Materials Purchased (1098-T)
3. Private K-12 Tuition
4. Child Care receipts
5. Details to qualifying Residential Energy Credit purchases (energy efficient doors, windows, HVAC, solar panels, etc)
6. Details to qualifying clean vehicle purchase (plug-in hybrid/electric)
7. Home Purchase/Sale closing statement
8. IRA/Retirement Contributions made directly (not employer paid or payroll deducted)
9. Other credits

**Other (Additional information may be needed)**

1. Self-Employment Business or Farm Income and Expense Details
2. Rental Property Income and Expense Details
3. Other income