**Tax Preparation Checklist**

(*Please Bring Copy of your Last Year Income Tax Return if you are a NEW Client*)

**PERSONAL INFORMATION**

* Your and your spouse's social security cards or tax ID number (ITIN)
* Address, Phone Number and Email Address
* Bank Account and Routing #s if expecting a refund or want to pay taxes owed electronically

**DEPENDENT(S) INFORMATION**

* Birth certificates and social security cards or tax ID numbers (ITIN)
* Court documents stating legal custody (if claiming kids that are not yours or if your name is not on Birth Certif.)
* Form 8332 showing that the child’s custodial parent is releasing their right to claim a child to you (if applicable)
* Childcare records (including the provider's tax ID number (EIN/SSN)-Name-Address-Phone Number) if applicable
* School record or medical record for all dependents (***Needed every year-* No shot records or medical ID cards**)
  + Other documents accepted to probe residence-Rental agreement w/ dependents Listed
  + Medical bill/School Report card with dependents name and address
  + Bank statement in dependents name with address

**SOURCES OF INCOME/ EXPENSES**

* Forms W-2, Gambling income (W-2G), 1099 MISC or NEC, K-1, Rental Income and Records of all expenses related to business— (check registers or credit card statements, and receipts)
* Unemployment, state tax refund (1099-G)
* Business-use asset information (cost, date placed in service, etc.) for depreciation
* Record of estimated tax payments made (Form 1040–ES)
* Retirement Income, Pension/IRA/annuity income (1099-R), Social security/RRB income (1099-SSA, RRB-1099)
* Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
* Income from sales of stock, other property (1099-B, 1099-S) or Virtual Currency Sales records (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)

**S-Corporations or LLC:** If filed for S-election (Form2553); Proof of acceptance from the IRS with Acceptance Effective Date or prior year tax return filed

**OTHER TYPES OF DEDUCTIONS**

* Home Ownership
  + Forms 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)
* Charitable Donations, Medical Expenses, Amounts paid for healthcare insurance and to doctors, dentists, hospitals, Health Insurance Forms 1095 (A-B-C), Educational Expenses (1098T/1098E)
* Receipts for classroom expenses (for educators in grades K-12)