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HOW TO PREPARE FOR YOUR TAX APPOINTMENT

Gather together the following documentation and bring to your tax appointment:

Getting Started

- ❑ Copy of last years' taxes (if you are a new client)
- ❑ Your Social Security number, Driver's License and birthdate (& spouse's if applicable)
- ❑ Social Security numbers and birthdates for your spouse, children and/or other dependents
- ❑ Estimated taxes paid during the year
- ❑ 1095 forms reporting Health Insurance Coverage for you, your spouse, children/other dependents
- ❑ Bank account and routing numbers for direct credit/debit of your refund or amount owed

Gathering Your Income

- ❑ W-2s from your employers
- ❑ 1099-MISC forms for self-employment income
- ❑ K-1 forms for income from a partnership, small business, or trust
- ❑ 1099-SSA forms showing Social Security received
- ❑ 1099-R forms for retirement distributions
- ❑ 1099-G State refund, unemployment
- ❑ 1099-K reporting all payment transactions
- ❑ Other income: self-employment, rental, farming, W-2G gambling income, etc.
- ❑ Alimony – if received before 2019 or paid per divorce agreement. Not applicable 2019 and after.

Checking Your Investments

- ❑ 1099-INT (interest) forms
- ❑ 1099-DIV (dividends) forms
- ❑ 1099 Brokerage Statements

Including Your Deductions

- ❑ 1098 forms reporting Mortgage interest
- ❑ 1098-E forms reporting student loan interest
- ❑ 1098-T forms reporting tuition plus all original paid receipts for tuition, books, supplies, etc.
- ❑ Other expenses: college, medical, dental, solar, self-employment, rental, farming, unreimbursed employee (for California only)
- ❑ Real estate taxes
- ❑ Daycare or childcare costs
- ❑ Contributions to traditional or SEP-IRA
- ❑ Gifts to charities and churches

And any and all questions and documents you may have related to this year's tax return