



WELCOME TO YOUR TAX PREPARATION APPOINTMENT

Please bring the following documents.

Personal Information

- Valid photo identification
- Social Security numbers for all individuals included on the return
- A copy of last year's federal and state tax returns
- Bank account information for direct deposit or payments

Income Documentation

- W-2 forms from employers
- 1099 forms: NEC, MISC, K, INT, DIV, B, R, G
- SSA-1099 Social Security statement
- K-1s from partnerships, S-corporations, estates, or trusts
- Rental income records
- Self-employment revenue statements or bookkeeping summaries
- Any income received in cash, tips, or gig platforms

Self-Employment / Business Income (if applicable)

- Profit and loss summary or bookkeeping export
- Mileage logs
- Home office expenses (square footage & bills)
- Receipts for business-related purchases
- Prior depreciation schedules (if available)

Deductions and Credits

- Home & Property: Mortgage interest (Form 1098); Property tax statements; Closing documents (buy/sell)
- Education: Tuition (1098-T); Student loan interest (1098-E); Educational materials
- Family & Dependents: Childcare receipts and EIN/SSN; Adoption documents
- Health: 1095-A/B/C; Medical expenses; HSA contributions/distributions
- Charitable Contributions: Receipts for cash or non-cash donations

Investments & Retirement

- Brokerage statements



- Capital gains/loss summaries
- IRA or HSA contribution documents
- Pension or IRA distribution forms

Additional Information

- Estimated tax payments made during the year
- IRS or state correspondence
- Foreign bank accounts, assets, or income (FBAR/FATCA compliance)

Questions to Consider Before Your Appointment

- Major life changes (marriage, divorce, move, birth, etc.)
- Started or ended a job or business
- Bought or sold property
- Investing/crypto/gig or e-commerce income