



# A TAX OFFICE

TAX PREPARATION, ACCOUNTING & CONSULTING

## **HERE IS A LIST ITEMS YOU MAY NEED**

### **Personal Information on each family member or individual**

Valid ID w/name and picture for taxpayer & Spouse

Date of Birth

**SSN** Card- (If Available)

Last Year's Tax Return- (If Available)

1095 A (If you had insurance from the Market Place)

### **INCOME AND TAX INFORMATION**

W-2's

1099-MISC-Miscellaneous Income

Unemployment Compensation (1099-G)

Interest Income-(1099-INT)

Dividend Slips-(1099-DIV)

Stock Sales-(1099-B or statements)

Gambling or Lottery Winnings (1099-G)

Pension Income (1099-R)

State Income Tax Refund amount received in current year.

Self-Employment Income & Expenses

Sale or Purchase of Real Estate

Rental Income & Expenses

Sale of any Business Assets

Estimated Taxes Paid

Social Security or Railroad Retirement

IRA or 401(K) Distributions

### **DEDUCTIONS/ADJUSTMENTS**

Medical Expenses

Real Estate or personal Property Taxes

Mortgage Interest/Insurance Premiums

Charitable Contributions

Employee Business Expenses

Gambling Losses (only if winnings are being reported)

Moving Expenses

Traditional IRA Contributions

Higher Education, Educator Expenses & Student Loan Interest

1098-T

### **CREDITS**

Child Care Expenses with Providers **EIN** or **SSN**

Adoption Expenses

