



Information Needed to Prepare Your Tax Return

Health Care Coverage Information

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange), **(or)**
- Form 1095-B Health Coverage Statement (issued by insurance company, **(or)**)
- Form 1095-C Employer-Provided Health Insurance Offer and Coverage, **(or)**
- Proof of health insurance coverage for each member in the household, **(or)**
- Exemptions – if you are exempt, you need the following:
 - An Exemption Certificate Number (ECN) issued by the Marketplace, **(or)**
 - Proof that another exemption applies.

Personal Information & Miscellaneous

- Social Security cards for Taxpayers and Dependents
- Dates of birth for Taxpayer, Spouse, and Dependents
- Residential and mailing address
- Copy of prior year's tax return (ONLY if we did not prepare return for you)
- Any tax notices received from the IRS or other taxing authorities

Income Information

- W-2 Forms
- Independent contract work or other income (Form 1099-Misc)
- Capital gains income, sale of assets
- Pensions & Annuities
- Alimony received
- Jury Duty Pay
- Gambling & Lottery Winnings (Form W2-G)
- Prizes & Awards
- Scholarships & Fellowships
- State & Local Income Tax Withheld
- Tax Refunds & Unemployment
- K-1's from S-Corps, Partnerships, Trusts

Other Income

- Interest Income (Form 1099-Int)
- Dividend Income (Form 1099-Div)

- Proceeds from Broker Transactions (1099-B)
- Retirement Plan Distribution (Form 1099-R)
- Health Savings Account and Long-Term Care reimbursements (1099-SA or 1099-LTC)
- Sale of Home or Other Real Estate (Form 1099-S & closing documents/HUD-1)
- Rental property income and expenses
- Rental property information (cost, date placed in service, prior depreciation taken)
- Sale of Assets (include original cost basis and date of purchase)

Deductions

- Mortgage Interest (Form 1098)
- Real Estate Taxes Paid
- IRA & Other Retirement Plan Contributions
- Moving Expenses
- Student Loan Interest Paid
- Medical (prescriptions, co-pay's, mileage, etc)
- Charitable Contributions (receipts for all cash donations, letter from charitable organization for donations over \$250)
- In-kind charitable donations (details including date, description, value and original cost, letter from charitable organization for donations over \$250)
- Un-reimbursed expenses related to volunteer work
- Un-reimbursed expenses related to job (travel, uniforms, union dues, mileage)
- Personal Property Taxes
- Investment Expenses
- Job-hunting Expenses
- Education Expenses
- Child Care Expenses (need name, address & tax ID/SS# of provider)
- Medical Savings Accounts
- Adoption Expenses
- Alimony Paid (name and SS# of former spouse)
- Tax Return Preparation Fees

Self-Employment / Business Information

- Business entity type, description, EIN & address
- Information on business income and expenses
- 1099-MISC forms received from clients or customers
- 1099-K issued by merchant card providers, such PayPal
- Receipts & documentation for business assets purchased
- Business bank statements
- Business credit card statements
- Prior year depreciation worksheet
- Copy of 1099-Misc forms issued to vendors for services over \$600
- Accountable plan expense reimbursements or company expenses paid personally
- Retirement plan contribution information (SEP, SIMPLE, 401K)
- Inventory – beginning balance, ending balance & purchases in current year
- Business assets purchased and assets sold or disposed of (including vehicles)

- Details on loans to/from company (including loans to/from shareholder/partner)
- CRS Reports
- Payroll tax reports (941, 940, 903A, W-2s), if applicable
- Home office information
- Mileage log for business use of vehicle

Other Information

- Estimated tax payments
- Prior-year refund applied to current year and/or any amount paid with an extension to file
- Foreign bank account information: location, name of bank, account number, highest value of account during the year