

*Dear Tax Client:*

To properly prepare your Federal Income Tax Return please provide the following, as it applies to your situation:

**ALL TAX CLIENTS:**

Proof of income (W-2, 1099-MISC)

Social Security Cards or Green Cards for every person who will be named on your tax return & proof of relationship with each (lease, school records, birth certificates, etc proving the person lives with you)

Photo ID for every person over age 17 who will be named on your tax return

Letter of Coverage from your health insurance provider showing the months you were insured or a Letter of Exemption From Coverage from the Health Insurance Marketplace

Bank Interest Statement (Form 1099-INT)

Medical Expenses, Prescriptions, Insurance, Co-pays, Medical Mileage

Charitable Contributions (cash or items – receipts required)

Work expenses that were not reimbursed by your employer

Child care provider name, address, phone number and EIN plus amount you paid them in the tax year

*IF you are a new tax client, please bring your tax return from the previous year for a FREE REVIEW*

**IF YOU OWN, BUY OR SELL A HOME OR OTHER REAL ESTATE:**

Home Mortgage Interest Statement (Form 1098)

Proof of property taxes you paid in the tax year

Proof of Home Owner's Insurance you paid in the tax year

IF you purchased/sold home or other real estate during the tax year provide your HUD1 or Final Settlement Statement (purchase contract documents for both date of purchase and date of sale if applicable)

**IF YOU SOLD STOCKS:**

Copy of transactions statement plus your original purchase date and price for each transaction and 1099-B or 1099-DIV

**IF YOU OWN YOUR OWN BUSINESS – SOLE PROPRIETOR:**

Records of business income by category

Records of business expenses by category

Copy of your business license and occupational license if applicable

Payroll Expense summary and Forms W-2/W-3

Copy of any State Sales Tax, Employer Tax or other tax you filed and paid during the tax year

Copy of any 1099-MISC you issued to others during the tax year and 1096

IF you use QuickBooks you may provide a QuickBooks Backup Copy on CD and provide your login info

**IF YOU ARE MEMBER OF AN S-CORPORATION, PARTNERSHIP, LLC:**

Copy of K-1, dividends statement, other documents showing your portion of income or loss

**IF YOU HAVE FOREIGN INCOME, PROPERTY, BANK ACCOUNT OR FOREIGN RESIDENCE:**

Please provide information relating to your foreign income and/or residence and/or bank accounts & other assets. This is required for IRS and separately reported annually to US Dept of Treasury.

*All income earned by US Citizens and Resident Aliens, no matter what country the funds are earned in, or where the taxpayer resides, are taxable on your Federal USA Income Tax Return. IF you resided outside the USA for the tax year you may be entitled to a Foreign Income Exemption Credit.*

**IF YOU HAVE ANY QUESTIONS ABOUT THE DOCUMENTS REQUIRED FOR PROPER PREPARATION OF YOUR FEDERAL (and State if applicable) INCOME TAX RETURN, PLEASE ASK US.**