***Check List for Personal Tax Information Requested***

* Driver’s License number; issue date and expiration date needed for all taxpayers
* Contact information; phone number, email, current address
* Documentation for the cost of your health insurance. **If you purchased insurance through the Health Care Marketplace, you will receive a 1095-A form**
* Full name, social security number and birthdate of taxpayer, spouse and dependents
* All W-2 forms
* 1099-INT Interest income or 1099-DIV dividends or bank or savings statement
* Unemployment 1099 form
* 1099-R Pension form
* 1099-SSA Social security payments form
* 1098-T or 1098-E student loan interest form
* IRA information
* 1099-B Sale of Stock-Statement from the Broker and Purchase statement
* Property Tax bills paid for during tax year
* Form 1098 Mortgage Interest Statement
* Automobile License Tab Fees
* Medical expenses; doctor, dentist, health insurance, mileage, prescriptions)
* Interest on land contract with full name, address, social security number of contract holder
* Charitable contributions
* Rental payments information
* **If you bought or sold a house within the tax year please bring all of the closing paperwork for both the bought and sold house. HUD statement or Settlement Pages.**
* Total of business or rental income
* List of expenses with total amounts paid by category (i.e., supplies, rent, etc.)
* List of new equipment or building improvements, their cost and date purchased during the tax year
* Dates and amounts of any estimated tax payments made to Federal or State.
* Bring any additional information or questions you may have.
* **NEW CLIENTS: Provide a copy of prior year’s tax return.**

***ALL TAX RETURNS MUST BE PAID IN FULL PRIOR TO RELEASE TO THE IRS & STATE.***