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P.C.

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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.