

In addition to a copy of last year's tax return (new clients only), please gather the following documentation to bring to your appointment or to mail to us.

Income:

- W-2 for Salary, Wages, and Tips
- W-2G for all Gambling winnings
- Forms 1095-A, B, and/or C Health Insurance Marketplace Statements
- 1099-DIV for Dividends Received
- 1099-INT for Interest Received (taxable and tax-exempt)
- 1099-G for Certain Government Payments (e.g., Unemployment Compensation)
- 1099-MISC for Miscellaneous Income (e.g., Non-Employee Compensation, Rents, Royalties)
- 1099-R for Distributions from Pensions, Annuities or IRAs
(NOTE: If you rolled over a lump sum distribution from a qualified plan or IRA, please include proper substantiation.)
- 1099-Q for Payments from Qualified Education Programs under Sections 529 and 530
- 1099-S for Proceeds from Real Estate Transactions (and closing statements)
- SSA-1099 for Social Security Benefits
- K-1s for income/loss from Partnerships, Estates, Trusts, and S-Corporations
- Sale/Exchange of Property (cost, sales prices & dates of transactions)
- Brokerage Statements for Securities (including cost basis of securities and purchase dates)
- Taxable Value of Insurance From Pension/Profit Sharing
- State & Local Income Tax Refunds
- Alimony Received
- Child Support
- Disability Income (may qualify for exclusion)
- Worker's Compensation
- Veteran's Pension
- Director/Executor's Fee
- Commissions
- Bonuses, Prizes and Awards
- Scholarships (Grants)
- Jury Duty Pay
- Profit/Loss from Business (if applicable, see page 4 for a list of deductible expenses)
- Profit/Loss from Rental Property (if applicable, see page 4 for a list of deductible expenses)

Adjustments to Income:

- IRA Contributions - Deductible (annual statements for taxpayer/spouse)
- IRA Contributions - Nondeductible and/or Roth IRA (annual statements for taxpayer/spouse)
- SEP Contributions (annual statements)
- Keogh Contributions (annual statements)
- Penalty on Early Withdrawal on Savings
- Alimony Paid (recipient's Social Security number, and copy of divorce decree or separation agreement)
- Health Savings Account Information

Credits:

- Child Tax Credit
- Child & Dependent Care Credit
 - Name, address and Tax ID number of organization providing care, or
 - Name, address and Social Security number of individual providing care
- Credit for the Elderly or Disabled
- Foreign Tax Credit
- Residential Energy Credits (e.g., solar electric, solar water heating, small wind energy, etc.)
- Education Credits

Itemized Deductions:

1. Medical

- Medical Insurance
- Medical & Dental Expenses
- Medical Travel
- Medicine & Drugs
- Wheelchair/specialized equipment
- Eyeglasses/Contact Lenses
- Therapy, X-Ray/Similar Services
- Nursing Services/Including Board
- Payment For Acupuncture
- Purchase or Rental of Equipment
- Support/Corrective Devices
- Treatment at Center
- Artificial Teeth/Limbs
- Hearing Aids/Batteries
- Crutches
- Birth Control Surgery
- Special Schooling
- Ambulance Services
- Lab tests

2. Taxes Paid

- State and Local Estimated Taxes Paid (as itemizes on page 1)
- State and Local Income Tax Withheld
- State and Local Income Taxes Paid - Prior Year
- Sales tax paid (if applicable – no State income tax deduction)
- Real Estate
- Personal Property
- Other Taxes

3. Interest Paid

- Mortgage Interest
 - Paid to financial institution (Form 1098; Tenant Shareholder letter for Cooperative Apartment owners)
 - Paid to an individual (name, address, and Social Security number of individual)
- Points
- Investment Interest (limited to portfolio income)
- Margin Accounts
- Other

4. Contributions

- Donations by cash, check or credit card to charitable organizations
- Other than cash contributions – documentation should include:
 - Date acquired by donor
 - Donor's cost
- Donated articles – documentation should include:
 - Name & Address of Donee Organization
 - Date of Contribution
 - Description of donated articles
 - Fair market value of donated articles
- Travel costs for services contributed (NOTE: Value of services contributed is not deductible.)

5. Casualty/Theft Loss - for property damaged by storm, water, fire, accident, or stolen, provide:

- Location of property
- Description of property
- Amount of damage
- Insurance reimbursement
- Repair costs
- Federal grants received

6. Job-Related Moving Expenses (minimum distance = 50 miles)

- Move household goods
- Lodging during move
- Travel to new home

7. Miscellaneous Deductions

- Unreimbursed employee business expenses (see page 5)
- Investment expenses
- Tax preparation fee

Other deductible expenses (if applicable):

A. Business Expenses

- Furniture and equipment
 - Accounting and auditing services
 - Advertising
 - Amortization
 - Equipment rental
 - Repairs and maintenance
 - Storage and warehousing
 - Subcontractors
 - Supplies
 - Dues, licensing, and publications
 - Telephone
 - Travel
 - Seminars and conventions
 - Interest on business indebtedness
 - Wages
 - Entertainment
 - Renovations
 - Office supplies
 - Postage
 - Rental of business property
 - Home office (square footage used)
 - Bank charges
 - Car and truck expenses (see below for details)
 - Commissions
 - Depreciation
 - Taxes
 - Employee benefits
 - Insurance
 - Utilities
 - Laundry and cleaning
 - Legal services
- NOTE: Club dues are no longer deductible

B. Rental Property Expenses

- Advertising and commissions
- Carpentry
- Landscaping work
- Snow removal
- Upkeep and cleaning
- Insurance
- Repair work
- Electrical
- Painting and decorating
- Plumbing
- Trash Removal
- Equipment
- Improvements
- Furniture
- Utilities
- Pest Control
- Taxes
- Furnace and air conditioning
- Interest
- Other

C. Business auto expenses

- Motor club dues
- Gas, oil and lubrication
- Repairs and maintenance
- Tires and accessories
- Lease payments
- Licenses and fees
- State and local taxes
- Insurance
- Parking, towing, and tolls
- Garage rental
- Interest on auto loan
- Other

D. Unreimbursed Employee Business Expenses

- Fares for airplane, taxi, etc.
- Meals
- Lodging
- Dues-professional assoc. or union (not club)
- Educational
- Entertainment
- Office
- Postage
- Other