



Documents needed for tax preparation

New Clients:

Your last filed tax return

Social security cards – taxpayer, spouse, dependents

Drivers' Licenses – taxpayer and spouse

All Clients:

W-2s (wages and gambling winnings)

Last paystub of the year

1099-MISC and 1099-NEC – nonemployee compensation, rental income

1099-INT, 1099-DIV, 1099-B – brokerage transactions, dividends, interest

1099-Gs – unemployment, state, or local tax refunds

1099-R – Retirement account distributions

1099-SA – HSA reporting form,

1099-K – payments from 3rd party apps and networks

5498-SA – HSA contributions

1095 – health insurance

1098 – mortgage interest, also real estate tax and personal property tax paid

1098-E – student loan interest paid

1098-T – tuition payments for self, spouse, and dependents

Charitable donations – name of organization, date and amount of contribution (copy of receipt if \$250 or more); list of items or valuation if donation of items rather than cash

Dependents – a report card or pediatrician bill that shows the child lives with you

Virtual or crypto currency – If you sold or traded virtual currency, send date and amount of purchase as well as date and amount of sale, preferably in an Excel or CSV file

Rental properties – income and expenses such as cleaning, commissions, repairs, insurance

Self-employed – income and expenses, home office, mileage, medical insurance, retirement plans