Tax Information Checklist

- Prior year’s tax return (new clients)
- Driver's License
- Birthdates and social security numbers (new clients)
- Records of estimated tax payments made
- W-2 statements
- All 1099 statements
- K-1 statements from estates, trusts, etc.
- Year-end statements for mutual fund and brokerage accounts
- Last pay stub and last pension statement for 2019
- Foreign bank and retirement statements
- Contributions to IRA or Health Savings Accts
- Property taxes paid, vehicle registration paid
- Student loan interest paid (Form 1098E)
- Tuition paid to a college/university (Form 1098T)
- State and local income taxes paid
- Mortgage interest paid (Form 1098)
- Charitable contributions - cash totals and non-cash valuations, totaled
- Child care expenses and provider’s name, address, and SSN or EIN
- Alimony received or paid – if paid need payee’s SSN
- Marketplace medical insurance: 1095 series forms
- Medical expenses and insurance premiums paid
- Closing statements for home purchase or sale
- Cost and date of purchase of any business property or investments sold
- Rental/Business/Farm income and expenses, basis of property and improvements, depreciation info (worksheet on website)
- Dependent Information: name, dob and ssn

Our extended tax season hours:

Monday - Thursday	**9-8**
Friday	**9-6**
Saturday by appointment	

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