



*FINANCIAL SERVICES*

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# PROFESSIONAL, INC.

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Accounting TaxPrep Investments Insurance

## **Documents Needed to Prepare Your Taxes**

This checklist is a guide for items you may need to provide to prepare your taxes.

W2's for wages earned

Social Security earnings statement SSA-1099

Income and expenses from your business, farm or rental property

**1095 for Health Insurance Verification (REQUIRED)**

1099's for Interest, Dividends, Capital Gains & Stock/Mutual Fund Sales

1099-R for retirement withdraws & pensions

1099's for unemployment compensation

1098's for Home Mortgage interest paid

K-1's for any ownership in LLC's or S-Corps

Traditional & Roth IRA deposits and conversions made

Student loan interest paid 1098-E

College tuition and fees paid w/year of college (freshman, sophomore, etc.) 1098-T REQUIRED

Alimony paid w/the soc sec number of whom you paid

Child care expenses paid w/the soc sec number & address of whom you paid

Gambling winnings & losses W2-G

Real estate taxes paid

Federal, State & Local estimated taxes paid

Charitable contributions paid w/proof of any donation over \$250

Medical, dental & optical expenses and health insurance paid

## **Other Points to Remember**

IRS matches your name on your tax return to social security, please make sure we have the exact spelling

If this is the first year we are preparing your return, please bring copies of your tax returns for the last 2 years

If you would like direct deposit for a faster refund, please bring a voided check

If you have a new dependent, please provide the name, social security number and the date of birth

If you have moved, please provide your new address, phone, school district and date you moved

**If you have a foreign account, new laws require disclosure to the government**

**If you bought or sold any Crypto Currency (eg. Bitcoin), you must report your gains/losses**

**Refer a Friend and get \$10 off your tax prep fee !**

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