

This list is not all inclusive but can be used as a guide to help you prepare for your tax appointment. Bring all tax related documents relevant to your tax situation. If you're unsure always consult with your tax advisor.

## Taxpayer (TP) & Spouse (SP) Information

- TP social security number/ITIN
- SP social security number/ITIN (*If married filing joint/separate*)
- TP/SP Non-Expired DL or ID (*other acceptable form of identification*)
- TP/SP IP PIN (**REQUIRED to file electronically**)
- Current Home Address (**Proof of Residency**)
  - Utility Bill
  - Mortgage Statement/Lease Agreement
  - Real Estate Tax Statement
- Primary Contact Number & Email Address
- Married but separated (**Separation Agreement/Proof of separate living quarters for at Least 6 months**)
- Divorce Decree
- Custody Order

## Dependent Child(ren) < 17 years of age (Foster/Adopted Child)

- Social Security number (card if available)
- Birth Certificate
- Non-Parent or Legal Guardian
  - Temporary Placement Order, Notarized statement of custody arrangements
- Proof of Residency (School Records/Report card, Daycare Statement, Healthcare/Medical Records)
  - School Records, Report Card or Statement
  - Lease Agreement, Landlord or Property Management Statement
  - Daycare Financial Statement
  - Healthcare/Medical Records
  - Place of Worship statement
  - Social Services/Placement Agency Statement
  - Form 8332 (**Release/ Revocation of Release of Claim to Exemption for Child by Custodial Parent**)

## Dependent(s) > 18

- Non-Expired DL or ID (*other acceptable form of identification*)
- IP PIN (*if applicable*)
- Dependent(s) social security number
- If student over >18 or permanently/totally disabled
  - School Enrollment Records showing at least 5 months of attendance
  - SSI, Healthcare Provider Statement, or Social Services Verification Letter

## Income from Employment, Self-Employment, Rental Property & Retirement

- W2, 1099-MISC, Unemployment 1099-G
- IRA Distributions 1099-R (**Pensions & Annuities Schedule K-1 (dividends)**)
- Interest Income from 1099-INT, 1099-OID, 1099-DIV (**Taxable and non-exempt**)
- Capital Gain or Losses (**Bank/Credit Card Statements, Invoices & Receipts**)
- Business assets claiming for depreciation
- Alimony
- Sales or Stocks 1099-B, 1099-S (**Taxable and non-taxable**)
- Farm Income or Loss records
- Taxable Social Security Benefits 1099-SSA, RRB-1099, Form 5498 (**trustee of IRA**)
- Gambling income from W-2G (**include record of expenses**)
- HSA 1099-SA or 1099 LTC
- Other records of all income (Jury duty, Prizes and Awards)

## Deductions and Credits

- Form 5468-SA
- Records of moving expenses
- Real Estate/Personal Property records
- Sales Tax receipts on qualified major purchases
- Healthcare financial records (**Physician, Dentist & Hospitals**)
- Energy saving home improvement receipts
- Investment expense records
- Student Loan Interest Form 1098-E
- Charitable donations records (**Cash and Non-Cash**)
- Charitable mileage records
- Education Credits Form 1098-T (**records of qualified expenses**)
- Childcare Credit (**financial statement or receipt**)
- Foreign Tax income and expenses (**only on foreign income**)
- Business use of vehicle receipts of qualified expenses (**mileage log, parking, tolls, repairs etc.**)
- Casualty or theft losses records
- Federally Declared Disaster records
  - Property losses
  - Rebuilding & repair cost
  - Insurance reimbursements
- Other MISC deductions and credits records (**ask your tax advisor**)