

# What documents need to bring in my Tax Appointment?

*The Documents you need for Tax Preparation depend on your situation. To help you prepare we design this Tax List*

## Personal Information

- Your social security number or tax ID number
- Your spouse's full name, social security number or tax ID number, and date of birth
- Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS.
- Routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose
- foreign reporting and residency information - if applicable

## Dependent(s) Information

- Birth Certificates and social security numbers or tax ID numbers
- School record year 2023 with Name, Date of Birth , Address .
- Under 6 years is valid a medical record
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

## Sources of Income

### Employed

- Forms W-2

### Unemployed

- Unemployment (1099-G)

### Self-Employed

- Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC
- Records of all expenses — check registers or credit card statements, and receipts.
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable
- Record of estimated tax payments made (Form 1040-ES)

### Retirement Income

- Pension/IRA/annuity income (1099-R)
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
- Social security/RRB income (SSA-1099, RRB-1099)

### Savings & Investments or Dividends

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC) Expenses related to your investments.
- Record of estimated tax payments made (Form 1040-ES) Transactions involving cryptocurrency (Virtual currency)

#### Other Income & Losses

- Payment Card and Third-Party Network Transactions (1099-K)
- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trust income
- Royalty Income 1099-MISC
- Any other 1099s received.
- Record of alimony paid/received with ex-spouse's name and SSN
- State tax refund.

## Types of Deductions

The types of deductions you can take depend a lot on your life situation. It's likely you won't need all of the documents listed below for your taxes.

#### Home and Vehicle Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
- Electric vehicle information
- All other 1098 series forms

#### Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations.
- Amounts of miles driven for charitable or medical purposes

#### Medical Expenses

- Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals.
- Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan.

#### Health Insurance

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

#### Childcare Expenses

- Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- Amounts paid to a baby-sitter or provider care of your child under age 13 while you work
- Expenses paid through a dependent care flexible spending account at work.

#### Educational Expenses

- Forms 1098-T from educational institutions
- Receipts that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest.

#### K-12 Educator Expenses

- Receipts for classroom expenses (for educators in grades K-12)

#### State and Local Taxes

- Amount of state and local income or sales tax paid (other than wage withholding)
- Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles.

#### Retirement & Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions.
- All other 5498 series forms (5498-QA, 5498-ES)

ADDITIONAL INFORMATION

**FIRST TIME CUSTOMERS**

Last year Tax return  
If you are married your marriage certificate.

**FOREING INCOME**

US taxpayers are required to report their worldwide income and foreign financial assets.

**HEAD OF HOUSEHOLD TAXPAYERS**

Need to bring a Bill in their name or a lease or a Notarized letter of their landlord to confirm the occupants of the property.

**TRANSACTIONS WITH ANY DIGITAL ASSETS :**

Need to report any Virtual currency transaction.