

Information Needed Checklist

Personal Information

- Full Name (For each family member)
- Date of Birth (For each family member)
- Social Security Card /ITIN /ATIN (For each family member)
- Last Year's Tax Return, if not prepared by our office
- Valid ID

Income and Tax Information

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statement)
- Self-Employment Income & Expenses
- Sale of a Personal Residence
- Gambling or Lottery Winnings
- State Income Tax Refund
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security or Railroad Retirement
- IRA or 401(k) Distribution
- Unemployment Compensation
- Miscellaneous Income (1099-MISC)

Deductions/Adjustments

- Medical Expenses
- Real Estate or Personal Property Taxes
- Mortgage Interest
- Charitable Contributions
- Employee Business Expenses
- Gambling Losses
- Moving Expenses
- IRA Contributions
- Higher Education Expenses
- Educator Expenses
- Student Loan Interest

Tax Credits and Other Information

- Child Care Provider: Amount Paid, Name, Address, & Employer Identification Number (EIN) or Social Security Number (SSN)
- Adoption Expenses
- Retirement Savings Contributions
- Earned Income Credit Documentation: Proof of Residency for each Qualifying Child
- Affordable Care Act: Proof of Health Insurance or Exemption Documentation