

Tax Form Checklist:

Checklist for the tax Season

1. W-2 (Employer Wage Statement)
2. 1098 (Mortgage Interest Paid to Bank)
3. 1099-MISC (Miscellaneous Income)
4. 1099-R (Distribution from IRA/Pensions)
5. 1099-B (Sale of Stock/Bonds & Other Investments)
6. 1098-T (Qualified Tuition Paid)
7. 1099-DIV (Ordinary/Qualified Dividends Received)
8. 1099-G (Unemployment Compensation)
9. 1099-INT (Interest Received from Bank)
10. 1099-SA (Distribution from Health Savings Account)
11. SSA-1099 (Social Security Benefits)
12. Donation Receipts (i.e. church, Goodwill, YMCA, etc..)
13. If homeowner, we require the amount of property tax paid to County
14. If renter, we require landlord name, address, and amount of rent paid per year
15. Excise Tax paid on vehicles
16. Copy of Drivers License
17. Email addresses
18. Bank Information: Type of Account, Routing Number, and Account Number
19. Copy of prior year Federal & State Income Tax Returns
20. Dependent Information (Name, Date of Birth, and Social Security Number)

21. College Students: Any amount paid for out of pocket for educational expenses

22. Current Investment Statements