

Personal documents

Bring all documents below.

- **Social Security Number verification letters, or Individual Taxpayer Identification Number assignment letters** for you, your spouse, and any dependents
- **Birthdates** for you, your spouse, and dependents on the tax return
- **Bank account and routing number**
- **2021 tax return**, if you have them

Income

Bring all documents that apply.

Employment Income

- **W-2 form(s)** for all jobs last year (your employer(s) will have sent you this by January 31st)

Self-Employment Income

- **1099-NEC, 1099-MISC and/or 1099-K**
- Records of income not reported on 1099 forms
- **Records of expenses** including receipts, credit statements, etc.
- **Record of estimated tax payments**

Retirement Income

- **SSA-1099 form** for Social Security benefits
- **1099-R** for pension/IRA/annuity income

Unemployment Income

- **1099-G** for unemployment benefits

Other sources of income

- **1099-G** for refund of state/local income taxes
- **1098-T** for scholarships/fellowships
- **1099-R** for disability income
- **Brokerage Account 1099-B - Gain or loss from the sale of stocks, bonds**
- **1099-S** for **Sale of any real estate**
- **1031 Exchange document from Qualified Intermediary**
- **Income or loss from rental property (use our template to complete)**
- **Alimony** received

- **Statements for prizes or lottery/gambling winnings (W2-G)**
- **1099-INT , 1099-OID or 1099-DIV** Interest and dividend statements from banks
- Records for any other income
- **Schedule K-1's from LLC/Partnership/S Corp or Trust or Estate**

Deductions

You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on. Bring documentation for all the following expenses you have.

- **Details IRA Contributions**
- **State and local taxes** you've paid
- **Mortgage statements and property tax bills** if you are a homeowner
- **College tuition (1098-T) and student loan statements (Form 1098-E)**
- **1099-Q for 529 plan distributions**
- **Childcare expenses**, including payment records or receipts and provider's name, address, and federal tax ID number (either their Social Security Number or Employment Identification Number)
- **Receipts for charitable donations (cash and non cash)**
- **Medical and dental bills**
- **Records for supplies used as an educator**
- **1099-SA for HSA distributions**
- **1042-S/ Form 8805 if applies**
- **1098-C for Automobile donations**
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Other Tax Documents or Notices

- **Form 1095-A/ FTB 3895** if you had coverage through the Health Insurance Marketplace
- Documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "IMPORTANT TAX DOCUMENT"

Estimated Tax Payments to Federal / State

Date of payments and Amounts paid. Please verify this from your bank records