

WHAT TO BRING TO YOUR TAX APPOINTMENT

PERSONAL INFO (New Clients Only)

- Copy of last year's tax return
- Dates of birth & Social Security Numbers for yourself, spouse, and dependents

INCOME DOCUMENTS

- W-2 (Wages & Salaries)
- 1099-R (Pensions, IRAs, 401(k) distributions)
- SSA-1099 (Social Security benefits)
- 1099-G (Unemployment compensation)
- Royalty Income & expenses (1099-MISC)
- Self-employment income & expenses - see worksheets on my website (1099-NEC)
- Railroad Retirement benefits (RRTA-1099)
- Gambling or Lottery winnings (W-2G)
- Jury duty pay, prizes, or awards
- Any other income from any source
- K-1s from Partnerships, S-Corporations (w/ QBI & Basis)
- K-1s from Trusts or Estates

INVESTMENTS & CRYPTO

- 1099-INT (Bank or Investment Interest)
- 1099-DIV (Dividends)
- ALL 1099-B forms from brokerage & crypto accounts
- Records of IRA/SEP/KEOGH contributions or rollovers
- Cryptocurrency transactions (1099-DA)

REAL ESTATE SALES & RENTAL PROPERTY (see website for more detailed worksheets)

- Rental income & expenses
- Closing statements for purchase and/or sale
- Records of home or property improvements

EDUCATION EXPENSES

- 1098-T (College Tuition Paid) and list of school expenses
- ⚠ Important: I cannot process education credits without Form 1098-T
- State tuition program contributions or distributions (1099-Q))
- Student loan interest paid (1098-E)
- Out of pocket classroom expenses (educators)

HEALTH INSURANCE & HSA/FSA

- Form 1095-A (Health Insurance Marketplace ONLY)
- ⚠ Your return will reject without this form.
- Long Term Care premiums paid
- HSA distributions (1099-SA)
- HSA contributions made outside employer payroll

OTHER INCOME & EXPENSES (If Applicable)

- Child care paid (must have provider name, address, SSN or business EIN, and amount paid).
- Adoption expenses
- Estimated tax payments made
- OT wages paid (statement from employer or final 2025 paystub)
- Interest paid on auto loan + vehicle VIN (2025 purchases only)

ITEMIZED DEDUCTIONS

- Medical expenses, totaled by category - RX, Dr visits, Chiropractor, etc. (out-of-pocket only - must not have been paid with FSA or HSA funds)
- Total of medical miles driven
- Mortgage interest (1098)
- Property tax paid receipts
- List of charitable donations (cash, check or card)
- FMV & your cost of goods donated to thrift store, as well as name, address, and tax id of organization donated to