

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