

# What I Need Prepare

## Personal Information

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- Your social security number/ITIN and your dependents
- Your spouse's full name and social security number
- Amount of alimony paid and ex-spouse's social security number
- Bring your 2021 and 2022 tax returns.

## Children dependents

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- Date of Birth and Social Security Number/ITIN of your children.
- Child Care Records (including provider ID number)
- School Records: Report Cards, Progress Reports, Transcripts
- Income of other adults in your household.
- Form 8332 shows that the custodial parent is giving the right to claim the child to the non-custodial parent (if this situation applies)

## Your Income

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### If Employee

- Forms W-2
- Forms 1099-K (deposits through PayPal, Stripe, etc)
- Forms 1099-R (retirement plan)

### Unemployment Unemployment

- Form, State Tax Refund (1099-G)

## If Self-Employed or a Contractor

- Form(s) 1099-Misc, Schedule K-1, income reports that verify amounts not reported on 1099s
- Records of all expenses- paychecks or credit card statements, and receipts or invoices
- Information on real estate and business machinery (cost, date put into service, etc. ) for depreciation
- Home office information if applicable square footage dedicated home office area and whole house square
- footage Proof of advance payments made (form 1040ES) Rental

## Income

- Records of income and expenses
- Information on real estate (cost, date placed in service, etc.) for depreciation
- Proof of advance payments made (Form 1040ES)

## Retirement Income

- Pension / IRA/annuity (1099-R)
- Traditional IRA cost (for example amounts you contributed to IRAs that have already had the tax taken out)
- Social Security/RRB- Income (1099-SSA, RRB-1099)

## Savings and Investment Accounts or Dividends

- Interest, Dividend Income (1099-INT, 1099-OID, 1099-DIV)
- Income from the sale of securities and other property and the cost you originally paid for them (if the price is not reported on the 1099-B)
- HSA Medical Savings Accounts and Extended Term Care Reimbursement (1099-SA or 1099-LTC)
- Expenses related to your investments (such as the commission of the stockbroker who helped you sell)
- Proof of advance payments made (Form 1040ES)

## Other Income and Losses

- Income from gambling winnings (W-2G or record showing income and also record losses of the game) Jury duty records
- Proof of jury duty
- Hobby income and expenses
- Income from awards and recognition
- Trust funds
- Royalty income 1099 Misc
- Any other 1099s received
- Proof of alimony paid/received with the name and social security number of the Ex-spouse

## Deductions

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### Homeowner(s)

- Form 1098 or another type of home interest payment
- Personal and real estate tax records
- Receipts for energy-saving home improvements
- All other forms of the 1098 series

### Donations Charitable

- donations Cash or check donations to churches, schools, and other non-profit organizations
- Proof of non-cash donations
- Record of miles used for medical purposes or volunteering for charitable organizations

### Medical Expenses

- Amount of money paid from pocket for medical insurance, visits to doctors, dentists, and hospitals

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## Health Insurance

- Form 1095-A if you This has health insurance through the Health Insurance Marketplace (Exchange)
- Form 1095-B or 1095-C if you have health insurance coverage through another source (eg. An employer, employer,
- insurance company, government plan such as Medicare, CHIP, TRICARE, VA, etc.)
- Marketplace Exception Certificate (ENC) if you applied and received a Marketplace exception (Exchange) Health

## Expenses Day Care

- Expenses paid to a licensed daycare center or family infant or preschool center
- Wages paid to a nanny
- Do not include expenses paid through a flexible spending account with work

## Educational Expenses

- Form(s) 1098-T received from institutions
- Receipts for itemized deductions for education expenses
- Proof of any scholarships or free tuition you or your dependents have received
- Form 1098-E if you pay interest on student loans

## Work Expenses and Tax Preparation

- Fees Vehicle expenses that are directly incurred to perform your job (toll fee, miles, gas,
- maintenance, license, property tax, interest expense, parking). then.
- Receipts for expenses incurred in the classroom (for educators in grades K 12)
- Employment-related fees (union dues, publications, tools, cost of uniform and its maintenance in
- laundry, travel)
- Job search expenses Employment
- records Relocation expenses not reimbursed by the employer
- Fees paid for prior year tax preparation

### **State and local taxes or sales**

- tax Amount of tax paid to the state/local (other than withheld from wages), or amount paid local sales tax
- Receipt showing the amount of sales tax paid on the purchase of a vehicle

### **Retirement and Other Savings**

- Form 5498-SA showing HSA contributions to medical account
- Form 5498 showing IRA contributions
- All other form series 5498 (5498-QA, 5498-ESA)

### **Federally Declared Areas Disaster Area**

- City/County where you lived/worked/owned
- Registros proving property loss (property value, cleanup costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims paid
- FEMA financial assistance information
- Verify if on the FEMA site the county has been declared a federal disaster area



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