

What I Need Prepare

Personal Information

- ☐ 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 2023 tax returns.

Children dependents

- ☐ 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

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/NEC, 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

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

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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