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Tax Preparation List

Please disregard any information that does not apply.

PERSONAL INFORMATION

- Copy of last year's tax return
- Your social security number
- Copy of a photo identification card for you and your spouse (if applicable)
- Your spouse's full name, date of birth, and social security number (We will need this if you are recently separated and not yet legally divorced)
- Your date of birth

DEPENDENT(S) INFORMATION

- Income of other adults in your home
- Dates of birth and social security numbers
- Childcare records (Include provider's tax ID number if applicable)
 - This can include camp costs
- Form 8332 showing that the custodial parent is releasing their right to claim a child

SOURCES OF INCOME

Employed

- Forms W-2

Self-Employed

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Summary of all business expenses
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Business-use of vehicle information
 - Total miles
 - Business miles
 - Make and model of vehicle(s)
- Office in home information (if applicable- Need square footage of home and office space)
- Record of estimated tax payments made (Form 1040ES)
 - Federal
 - State

Rental Properties

- Income
- Expenses

Other

- Brokerage Statements showing investment transactions for stocks, bonds, etc.
- Forms 1099
 - 1099-R- Retirement Plan
 - 1099-INT- Interest
 - 1099-DIV- Dividends
 - 1099-MISC-Miscellaneous income
 - SSA 1099- Social security
 - 1099-G-State or local refunds
 - Gambling winnings

TYPES OF DEDUCTIONS

Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements
- All other 1098 series forms
- Copies of closing statements regarding the sale or purchase of real estate
- Water & Sewer bill (only if 65 years or older)

Renting

- Total rent paid for the year

Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amount of miles driven for charitable medical purposes

Health Insurance

- Form 1095-A
- Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
- Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)
- 1099 HC- Massachusetts Form
- Health Insurance Expenses

Educational Expenses

- Forms 1098-T from educational institutes
- Form 1098-E if you paid student loan interest
- Records of any scholarships or fellowships you received

Miscellaneous Expenses

- Record of moving expenses (military only)
- Receipts for classroom expenses (for educators in grades k-12)
- Medical and Dental Expenses (if costs are equal to or exceed 10% of your adjusted gross income)
- Vehicle Excise Tax

State & Local Taxes or Sales Tax

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid

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