

Common Support Documents for Tax Preparation

- Driver's license for tax payer and spouse (married filing jointly/married filing separately), Social Security Cards (tax payer, spouse, dependents), Dependent school proof (1098T, school ID card)
- All Forms W-2 (wages), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), 1099-MISC (miscellaneous income), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer.
- Form 1095-A (for health insurance purchased through a public exchange), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095-C (for employer-provided health insurance coverage).
- Copies of your last year's tax returns (new clients only).
- Copy of the closing statement and legal documents if you bought or sold real estate.
- Mileage figures for any automobile expenses claimed, including total mileage, commuting mileage, and business mileage.
- Detail of estimated tax payments made, if any.
- Income and deductions categorized on a separate sheet for business or rental activities.
- List of itemized deductions categorized on a separate sheet for medical, interest, charitable and miscellaneous deductions.
- Copy of all acknowledgement letters received from charitable organizations for contributions made in the tax year.
- Form 1098 (mortgage interest statement) and copies of real estate tax bills, etc.